

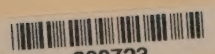
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ACCOUNTS AND PAPERS:

FORTY-SEVEN VOLUMES.

— (36.) —

COMMERCIAL REPORTS—*continued.*

Session

12 *March* 1894 — 25 *August* 1894.

VOL. LXXXVI.

1894.



ACCOUNTS AND PAPERS:

1894.

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THIRTY-SIXTH VOLUME.

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AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1893

ON THE

TRADE AND AGRICULTURE OF THE CONSULAR
DISTRICT OF CALAIS.

REFERENCE TO PREVIOUS REPORTS, Annual Series Nos. 1167 and 1152.

Presented to both Houses of Parliament by Command of Her Majesty,
MARCH, 1894.

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FRANCE.

CALAIS.

Consul Bonham to the Earl of Kimberley.

My Lord, *Calais, March 16, 1894.*

I HAVE the honour to transmit to your Lordship herewith my Report for the year 1893 on the Trade and Agriculture of my Consular District, which comprises the Departments of the Nord (except the town of Dunkirk), the Pas-de-Calais, and the Somme.

I have, &c.

(Signed) E. W. BONHAM.

Report on the Trade and Agriculture of Calais and Boulogne for the Year 1893.

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*Trade and Commerce.*General
remarks.

The trade of this part of France has not failed to suffer from the general slackness which has affected business everywhere.

The imports last year show a slight increase in weight at both Calais and Boulogne; this is not surprising, indeed one would have expected it to have been much larger. They rose considerably in 1891, as importers and others laid in stocks in anticipation of the new French customs tariff, which came into operation on February 1, 1892, although no doubt the imports in January of that year were abnormally large, for the whole year there was a very great decrease, and one might have fairly anticipated that there would have been a considerable recovery in 1893, as though both merchants and consumers may have laid in large stocks under the lower tariff, there was more than time for these to have been exhausted, so that the slender rise in the weight of imports clearly indicates how slack trade has been.

*Imports.*Calais
imports.

The weight of the imports at Calais shows a recovery in 1893, the figures for the last 5 years have been as follows:—

Year.					Quantity.	Value.
					Tons.	£
1889..	..	..	..	..	170,414	3,077,240
1890..	..	..	..	..	274,505	3,479,207
1891..	..	..	..	..	368,271	4,632,863
1892..	..	..	..	..	299,884	3,891,321
1893..	..	..	..	..	383,665	*

* Not yet published.

I give in Annex No. 1 particulars for the last year of the weights of the principal imports, but they are so lumped together that I fear they can be of but little interest. There was a decrease of 2,000 tons in the quantity of raw wool imported, the import of cereals increased considerably, the weight recorded being very nearly double that of 1892. Timber was 139,645 tons against 109,996 tons, this was owing, no doubt, to the gradual absorption of the stock imported before the increased duty.

I have before referred to the steady decrease in the quantity of coal imported from Great Britain, caused principally by the increased use of French coal, the weight is given as 51,951 tons in 1893 against 63,795 tons and 121,947 tons in the two previous years.

In pig-iron which comes from Great Britain there is also a heavy decrease, the weight last year being given as 4,257 tons against 15,860 tons and 19,954 tons in the two previous years.

Iron ore is imported from Spain (Bilbao) and increased to 45,970 tons from 35,489 in 1892.

Petroleum is imported from Philadelphia, there is one tank steamer under the French flag which runs to and fro regularly.

With regard to manufactured goods, tissues, yarns, &c., as the returns only give weights and not values, it is impossible to say much.

The increase in the weight of the imports at Boulogne during the past year was very small, the following are the weights and values during the past years:—

Year.					Quantity.	Value.
					Tons.	£
1889	..	.	..	..	199,971	7,110,783
1890	..	..	..	..	256,542	7,381,543
1891	.	..	..	..	274,740	11,134,924
1892	..	..	..	..	220,286	7,261,986
1893	..	..	..	..	222,566	.. *

* Not yet published.

Of the rise in value in 1891, 3,000,000*l.* is caused by the repayment of the loan of that amount by the Bank of England to the Bank of France.

The return of the principal articles of import at Boulogne in 1893, furnished me by Vice-Consul Surplice, forms Annex No. 2 to this report, the weight of the coals imported shows a fall of 31,651 tons as compared with the previous year, whereas timber shows an increase of 18,887 tons, being more than double that of the previous year, and jute which arrives from British India also shows a very heavy increase; there is a slight increase in wool, and a small quantity of grain was imported.

Exports.

The weight of the exports from Calais in 1893 remained Calais exactly the same as in the previous year, as is shown by the following figures:—

Year.					Quantity.	Value.
					Tons.	£
1889	..	..	..	..	48,805	3,353,915
1890	..	..	..	..	60,534	3,662,525
1891	..	..	..	..	57,530	3,791,509
1892	..	..	..	..	64,433	3,846,625
1893	..	..	..	..	64,452	.. *

* Not yet published.

In Annex No. 3 I give details of the weight of articles of export in 1893, but like those of the imports they are so lumped (1691)

together as to lose much interest; for instance, coals are included under the heading of stones and combustibles and given as 20,796 tons against 5,093 tons in 1892, in which year, for the first time I believe, a very small quantity of French coal was sent to Russia, whereas last year, owing to the strikes in Great Britain and the consequent high price of coal, several cargoes of French coal were exported, two large British steamers took cargoes to Malta, several cargoes went to Russia and Norway, and two Swedish sailing vessels are even returned as having left with it for England.

All this shows that our colliers should remember that although British coal is better in quality, still if prices rise too high, the public, especially abroad, will take to using foreign coal, and when once they get used to it may continue doing so and not revert to the British; French coal can compete with British in the market, as I have shown was actually the case, and if the strike had continued more of it would have been exported and steamers would have come here to coal, as it was some steamers running between this and Dover did coal here during its continuance.

There is no doubt, as I have mentioned under imports, that less British coal is imported than formerly, the slackness of trade alone is not sufficient to account for this, and it is well known the principal reason for it is that more French coal is now being used than was the case formerly.

This increase in the quantity of coal exported ought to have caused a rise in the total weights of exports; but since this is not the case, it is evident that other and, judging by the weight, probably more valuable articles of export decreased. Metal work and machinery show a heavy increase in weight, 11,557 tons against 2,426 tons, but even so are not up to their weight in 1891.

Tissues and yarns both show an increase, but with such a general description one cannot say much.

Poultry used to be largely exported, but owing to the rise in price there is no export of poultry raised in this vicinity, except of turkeys at Christmas.

A fair quantity of French beetroot sugar was exported as the shippers obtained the benefit of the French bounty, but the trade of Calais and Boulogne is such a really miscellaneous transit one that it is impossible to discuss the various articles in detail.

The particulars as to the weight of exports from Boulogne in 1893, as furnished me by Vice-Consul Sarplice, will be found in Annex No. 4, but the following résumé on the subject may be of equal interest.

Boulogne
exports.

Year.	Quantity.	Value.
	Tons.	£
1889.. .. .	114,411	10,541,022
1890.. .. .	134,809	12,769,361
1891.. .. .	122,680	8,968,502
1892.. .. .	127,524	10,492,436
1893	133,977	.. *

* Not yet published.

The exceptional value in 1890 is accounted for by the loan of 3,000,000*l.* in specie made to the Bank of England by that of France. I have asked Vice-Consul Surplice if he can explain the large rise in the value which occurred in 1892, but he is at a loss to account for it.

There was an increase for the year 1893 in the total weight : we find that Portland cement, the staple article of exports, alone accounts for 4,684 tons of this increase; fresh sea fish, which seems to be sent to England in larger quantities than formerly, shows an increase of nearly 2,500 tons, which is immense, the figure being 2,900 tons against 433 tons in 1892; and the weight of fresh fruit and prepared skins are both given as double what they were in the previous year, yet in spite of this the total weight only shows an increase of 6,453 tons.

Shipping and Navigation.

From information kindly furnished me by the customs I have been enabled to compile the return as to shipping visiting Calais in 1893 which forms Annex V. to this report. There was a falling-off of 121 in the number of ships arriving from abroad, 100 of these being steamers. This is to a great extent accounted for by the abolition, since October 1 last, of the club passenger service between this and Dover, which alone accounts for a diminution of 92 steamers. Of steamers other than British or French there were 52 against 71 in the previous year. The decrease is, therefore, more than accounted for. There is an increase of 70 in British steamers, and a decrease of 151 in French. Of these latter, 92 may be put down to the stoppage of the club service, and the remainder to more of the passenger boats run having been those flying the British flag, which is borne out by the fact that 636 are returned as mail packets, against 771 in the previous year; and of the British steamers 792 are classed as mail boats, against 754 in the previous year; 454 are down as general cargo steamers belonging to three cargo lines running between this and Dover, London, and Goole respectively, 21 as coming from Spain with iron ore, 20 with pig-iron, and 57 with coals from Great Britain, 59 from the North of Europe with timber, against 26 in the previous year, and 9 from different parts

(1691)

A 4

of the world with grain. Five large British sailing vessels also arrived with grain. The decrease in the sailing vessels is accounted for by the cessation of the export of straw, &c. Two British and 1 Norwegian steamer left this for Great Britain, and 1 French left for Italy with cargoes of sugar. Two British steamers left for Malta, and 1 British and 2 foreign steamers left for Russia, all with French coal. Of sailing vessels, 3 Norwegian cleared for Norway, and 2 Swedish for Great Britain, also with French coal.

Shipping at
Boulogne.

The returns relative to shipping at the port of Boulogne-sur-Mer during the year 1893, which have been furnished by Vice-Consul Surplice, and form Annex VI. to this report, show little variation. There was an increase of only 13 in the number of vessels entering that port. This is apart from the coasting trade, from which foreign vessels are excluded.

There was an increase of 24 in the number of British sailing vessels entering. Five of these were large vessels from India with jute, but there was a decrease of 5 in the steamers; 16 came from the Baltic with timber, against only 1 last year; 2 from India with jute, 1 from Belgium, 1 from the Philippine Islands, and the remainder all came from Great Britain. Amongst these latter are included the 2 daily steamers of the South-Eastern Railway Company, being the packets running in the through midday passenger service between London and Paris, and in the cargo service, also taking passengers, the regular lines to London and Goole, excursion steamers during the summer, and steamers with coal and other merchandise. Of the Dutch steamers, 64 arrived from Holland, and 54 from the United States.

On leaving this port 1,508 of the British steamers cleared for Great Britain, and 4 for Cochin China, cement forming a chief portion of the latter's cargo.

Of the Dutch steamers, 60 left for Holland, and 59 for the United States. Some vessels, both steam and sail, succeeded as usual in obtaining cargoes of Portland cement for various parts.

Population and Industries.

Population.

In the departments of the Nord and the Pas-de-Calais there is always an excess of births over deaths, which is far from being generally the case in France, and may be attributed to the population being largely of Flemish origin. Throughout the department of the Nord, as also in some parts of the Pas-de-Calais, the peasants still speak Flemish amongst themselves, and towards the Belgian frontier there are many who speak very little French.

The movement of the population in the two departments during the past few years has been as follows:—

DEPARTMENT of the Nord (Population 1,736,341).

Year.	Births.	Marriages.	Deaths.	Excess of Births over Deaths.	Divorces.
1889	50,257	13,112	35,574	14,683	214
1890	49,214	13,346	39,207	10,007	201
1891	51,086	14,284	38,213	12,823	236
1892	49,884	14,130	39,816	10,068	222

DEPARTMENT of the Pas-de-Calais (Population 874,364).

Year.	Births.	Marriages.	Deaths.	Excess of Births over Deaths.	Divorces.
1889	25,391	6,578	16,764	8,627	89
1890	25,141	6,762	18,979	6,162	76
1891	26,705	7,036	18,998	7,707	92
1892	25,747	7,240	20,101	5,646	105

With regard to the sea fishing at Calais, I have been ^{Fisheries.} furnished, from the same source as last year, with some information as to its results in 1893:—

Kind of Fish.	Quantity.		Value.	
	1892.	1893.	1892.	1893.
	Kilos.	Kilos.	£	£
Fresh fish taken in the trawl, comprising turbot, brill, soles, skate, plaice, red mullet, dabs, &c. ...	1,062,850	890,000	29,760	26,400
Mackerel (fresh) in nets or with lines ...	108,200	64,000	1,948	1,280
Herrings (fresh) ...	360,000	195,000	2,888	1,560
Fish taken with lines, such as whiting, cod, conger, &c. ...	62,500	62,500	2,125	2,280
Coast fishing on foot, shrimps, &c. ...	35,000	27,000	1,400	1,120
Total ...	1,628,550	1,229,500	38,121	32,640

It will be seen from the above that, although in 1893 there was a considerable fall in weight of fish taken, and in the total value, still the prices realised show an improvement. The decrease in quantity arose from several causes, firstly, the number of boats at Calais is not so large as formerly, and then the quantity of fish taken in the trawl was less, fish being scarcer.

Mackerel fishing was not extensively carried on, only a few small boats being engaged in it during the months of April, May, and part of June. The pursuit of this fish by the line during the season in October and November was almost nil. The herring fishery was likewise a failure; at first the results were good, but about the middle of November herrings appeared in large numbers, when all of a sudden came the hurricane of the 19th of that month, which was followed by a continuance of bad weather that obliged the fisherman to dismantle. It should be remarked that at Calais only about 30 small boats are engaged

in the herring fishery, which is carried on close to the coast. Fishing with deep sea lines is on the increase, but always with boats of small tonnage.

With regard to the fishing industry at Boulogne-sur-Mer, Vice-Consul Surplice reports as follows:—

“The fisheries form a very important industry at Boulogne, affording employment to many seamen and others connected with the trade.

“The number of fishing boats in 1892 was 396, measuring 15,900 tons, and employing 4,260 hands, in 1893 the number was 390, measuring 15,600 tons, employing 5,200 hands.

“The prices realised for fresh herrings caught off the coast were about the same as last year.

“The duty of 20 fr. per 100 kilos. (net) has almost put a stop to the importation of fresh sea fish, but this has not caused prices to rise.

“Ten boats have given a trial to a new system, they have taken on board supplies of empty boxes and ice, and have packed the catch in ice at sea with good results.

“There are now about 100 trawlers working from Boulogne, and their average gross gains amount to from 30,000 fr. to 35,000 fr. per annum per boat.

“Quantities of plaice have for months past been daily consigned to Billingsgate.

“The following table gives the result of the Boulogne fishery in 1893:—

Articles.	Quantity.	Value.
	Kilogrammes.	£
In boats—		
Cod, Doggerbank	1,820,000	20,080
Herrings, salted on board.. ..	14,210,000	166,208
“ fresh	10,660,200	186,412
Mackerel, salted on board.. ..	8,960,300	87,208
“ fresh	1,100,000	21,224
Other fresh fish	5,775,600	115,512
Oysters	12,000	88
Crustacea, lobsters, &c.	70,200	868
Shrimps	51,800	1,404
On foot—		
Fish and shell fish.. .. .	865,100	24,948
Total	48,024,700	562,952
“ 1892	41,625,660	469,766
“ 1891	44,720,760	569,572

“It appears from this table that the weight of the fish taken is an increase on that of the previous year, as also the value of the catch.

“No vessels were fitted out for Newfoundland or Iceland in 1893.

“In 1892, two vessels measuring 199 tons were employed in

the Iceland cod fishery, and 27 vessels measuring 1,415 tons, were employed in that fishery on the Doggerbank in 1893.

"The above figures refer to the Maritime District of Boulogne, but are divided as follows :—

District.	Quantity.	Value.
	Kilogrammes.	£
Boulogne	40,246,700	507,392
Audresselles	81,000	1,620
Le Portel	342,800	6,856
Equihen	674,200	13,484
Etaples	1,680,000	33,600
Total	43,024,700	562,952

The 49 sugar mills in the Pas-de-Calais during the season Sugar. 1892-93 dealt with 605,402,640 kilos. of beet, or 77,690,000 kilos. more than during the previous season.

But if the crop of 1892 was abundant, the saccharine richness of the roots generally left much to be desired, the yield falling from 9·83 per cent. in 1891-92 to 9·28 per cent. for 1892-93, up to the date of the report of the Director of Indirect Taxes (July, 1893) the quantity of refined sugar had been as follows :—

Description.	Quantity.
	Kilogrammes.
Minimum legal yield	46,263,981
Excess	9,282,081
Total	55,546,062

The distillery business in the Pas-de-Calais continues to flourish, seven new distilleries were opened in the season 1892-93 bringing the number up to 51, and the quantity of spirits obtained was 293,550 hectolitres, or 6,461,035 gallons, against 266,559 hectolitres, or 5,869,963 gallons, during the previous season.

The following were the various substances from which spirits were distilled :—

Articles.	Quantity.	
	1891-92.	1892-93.
	Kilos.	Kilos.
Barley	320,410	311,566
Oats	27,160	19,440
Rye	978,126	1,037,390
Other grain	2,047,100	1,894,300
Beet juice	4,342,221	5,275,818
Molasses, native	34,267,194	23,112,496
" foreign	10,829,934	23,278,612
Wine	..	67

It is stated that the reason for the decrease in the use of grain and native molasses, whilst that of beet and foreign molasses increased, is due to the abundance of the beetroot crop of 1892, and to the superior yield of imported over native molasses.

Beer.

The number of breweries at work in 1892 in the Pas-de-Calais was 530, or three less than in the previous year, nevertheless, there was a larger quantity of beer brewed; during the first half of 1893 the number of breweries fell to 526 against 529 in the first half of 1892, but again there was an increased quantity of beer brewed; the figures for these periods are as follows:—

Year.					Strong Beer.	Light Beer.	Total.
					Gallons.	Gallons.	Imp. gallons.
1891	..	..	..	..	13,209,059	12,853,642	26,062,701
1892	..	..	..	..	14,036,547	13,662,333	27,698,880
First half of 1892					7,060,588	6,874,537	13,935,125
„ 1893					7,188,623	6,996,671	14,185,294

Submarine cables.

In addition to the submarine cable, made at the factory of the Société Générale des Téléphones, which adjoins the docks here, and which was sent out to Cayenne in January, 1893, as stated in my last year's report, a considerable length of submarine cable was, last summer, put on board the company's cable ship and taken out to New Caledonia to be laid between that island and Australia; since then I believe little work has been carried on and no cable sent away.

Lace trade.

When I wrote my remarks on the lace trade just a year ago things were looking up, for a short time orders came in freely and manufacturers began to think they were on the eve of a boom of prosperity, but the illusion was of short duration; however, no doubt, some manufacturers were fully occupied, although the demand slackened as the year advanced and towards its close trade was bad; still, many firms had a very good year, and all did better than for some time past. As I said the closing months were more than dull, but with the new year orders always come in, and many are coming this year, whether they will continue is doubtful. The lace made at Plauen in Saxony seems to be much in vogue.

The gentleman who always kindly gives me information on the course of the lace trade, with which he is thoroughly acquainted and as to which he is able to speak with authority, has been good enough to give me the following memorandum on the subject:—

“Since my last report the lace trade has not been exempt from the severe trials which all industries have had to bear.

“Whilst the first 4 or 5 months of last year fulfilled all expectations, the crisis in America, together with the reduced prices of raw silk, have had a most fatal effect upon our trade.

“Our production depends, since some years, so largely upon

America, especially North America, that the unsettled monetary state of the United States, coupled with the expected reduction of duty, made buyers very careful, and consequently the generality of orders ever since have been very small in proportion to former years. Since about a month, confidence, I am glad to say, having been restored and the date for the new tariff being postponed apparently for some months to come, orders arrive more freely, and most makers are well occupied, and after all the spring season will not be the failure which many feared. Certainly the continual lowering of the prices of silk tends to keep prices of all kinds of silk laces cheaper than ever, and profits must in consequence suffer, the turn over becoming naturally smaller.

"The English market for our production is fairly good, seemingly even better than that of late years. Paris, on the contrary, has not yet opened out.

"Germany and Austria are buying moderately, all other European countries are about the same as usual, with the exception of Italy, where business relations have become very onerous.

"The South American trade, which is chiefly done through Paris, and is as a rule of no small importance, has become a dead letter.

"The articles principally 'en vogue' are of course in silk or in cotton and silk mixed, and especially in heavy makes.

"Chantilly laces in all cheap kinds are more or less a staple trade and sell pretty well. The demand for Bourdon laces and insertions continues to be very large, but here again prices have gone down considerably. Silk fancy laces with novel effects as Dentelle de Luceuil, Vieille Guipure, &c., have all been well taken up and repeat orders are beginning to come in.

"Certainly our principal makers, who cater for the extreme novelties in fine qualities, are again profitably occupied.

"Except Vals laces and a few extreme novelties, all kinds of cotton goods for export are very dull. The Plauen competition is again enormous in cotton goods. It is surprising how this make is just now in favour, not only for the United States but also in Paris, where after all fashions are created and make the law for the whole world.

"I know on good authority that very large orders have been placed in Plauen, and that prices there have advanced from 25 to 30 per cent. This shows plainly how much lace is in favour, and how busy Calais and Nottingham would be if this strong competition had not arisen.

"To conclude, all our makers have well weathered the ups and downs of last year, and no failures of any consequence have been registered. Had business only continued as it began in the first months, 1893 would have been a very prosperous year for Calais lace trade, and as it turned out nobody has much reason to complain.

"The differences between makers and workmen have been smoothed over, and they work harmoniously together.

"The statistics concerning the amount of the production and the raw material used are too unreliable to be mentioned."

Iron ore.

There are deposits of iron ore in the departments of the Pas-de-Calais as well as in the Nord, but the quality of the ore is poor, and apparently it no longer pays to work them; large quantities of iron ore are annually imported from Bilbao.

Iron.

The following table gives the usual information as to the production of the ironworks in the Nord.

Articles	1890.		1891.		1892.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
	Tons.	£ s. d.	Tons.	£ s. d.	Tons.	£ s. d.
Refined iron* ...	233,162	2 0 10	209,248	2 4 0	229,978	2 1 7
Merchant and special iron ...	272,360	5 19 5	268,813	5 19 8	273,778	5 17 2
Pig iron† ...	34,419	1 14 6	...	...	...	...
Sheet iron ...	55,224	7 11 8	55,003	7 5 10	49,977	7 5 2
Rolls... ..	...	...	36	5 12 0	...	...
Steel... ..	99,837	6 3 6	104,917	6 5 0	107,530	6 0 3

* Font d'affinage et du moulage en 2^e fusion.† Fonte de 2^e fusion (Fonderie).

These figures show little variation in production, but prices were slightly lower.

The foundry of Trith is still the only one producing phosphoric residue (scories de déphosphoration); the quantity produced and sold in 1892 was 14,960 tons, against 13,740 tons in the previous year.

Zinc.

The quantity of zinc produced at the works of D'Auby-lez-Douai shows a very slight decrease, having been 12,838 tons in 1892 against 12,996 tons in the preceding year; the average price realised was 19*l.* 7*s.* 6*d.* per ton, against 19*l.* 19*s.* 3*d.* in 1891 and 20*l.* 1*s.* 2*d.* in 1890, which was by far the highest price touched for many years past.

Coal mines.

The upward figures in the coal production of the north of France received a check in 1891 owing to a serious and prolonged strike in the Pas-de-Calais and to partial ones in the Nord, but in the Pas-de-Calais the output in 1892 sprung up again, and was very considerably higher than it had ever been before. In the Nord, on the other hand, there was again a slight fall, but in 1893 the output of the Nord showed a slight increase, whereas in the Pas-de-Calais, owing as usual to strikes, there is a considerable fall.

Year.					Quantity.	
					Pas-de-Calais.	Nord.
					Tons.	Tons.
1880	..	..	..	..	4,844,323	3,701,589
1885	..	..	..	..	6,131,358	3,582,760
1889	..	..	..	..	8,614,119	4,831,843
1890	..	..	..	..	9,076,579	5,134,772
1891	..	..	..	..	8,619,021	4,973,522
1892	..	..	..	..	9,835,645	4,663,122
1893*	..	..	..	..	8,971,305	4,759,521

* Approximate.

PAS-DE-CALAIS.

The coal mines of the department of the Pas-de-Calais are found in two distinct basins; the most important contains 18 concessions, with a superficial area of 138,325 acres (55,976 hectares), and lies between Douai and Bethune. This is the coal basin of the Pas-de-Calais properly so-called; the second comprises only three concessions, having an area of 12,914 acres (5,226 hectares), which constitutes the basin of the Boulonnais; of these but one is worked, and it produced only 2,530 tons last year.

The united concessions of Escarpelle and Courcelles-lez-Lens, which form a part of the mining basin of the department of the Nord, encroach, however, on that of the Pas-de-Calais.

I have, as usual, put the information as to hands employed, wages, accidents, &c., into a tabular form.

		1890.	1891.	1892.
Employed underground—				
Men	Number ..	25,360	27,949	29,900
Children	"	3,075	3,048	2,814
Average daily wages {	Currency ..	4 fr. 75 c.	4 fr. 86 c.	4 fr. 89 c.
	Sterling ..	8s. 10d.	8s. 10½d.	8s. 11d.
Days worked under-ground	Number ..	8,109,396	8,251,969	9,299,012
Employed above ground—				
Men	"	6,656	7,281	7,697
Women	"	691	764	754
Children	"	989	1,125	1,224
Average daily wages {	Currency ..	3 fr. 26 c.	3 fr. 34 c.	3 fr. 36 c.
	Sterling ..	2s. 7½d.	2s. 8d.	2s. 8¼d.
Days worked above ground	Number ..	3,173,713	2,840,446	3,102,887
Accidents	"	138	144	222
Persons killed	"	52	35	39
" injured	"	111	121	199
Total wages paid	Sterling £	1,899,242	1,982,873	2,236,704
" coal raised	Tons	9,076,579	8,619,021	9,835,645

The increase in the number of hands employed, to which I called attention last year, still continues. The Government engineer, in his last report to the Préfet on the working of the mines in 1892, states that the number of accidents given does not include a large number of minor accidents which were also inquired into, but which, as in former years, are not included in the figures given.

The following table gives details as to how the coal raised in 1892 was disposed of. It is taken from the official report to the Conseil-Général, but the total of the coal raised does not exactly tally with the definite figures officially published, and which have been courteously furnished me by the Government mining engineers:—

Description.				Quantity.
				Tons.
Sold in the Pas-de-Calais				1,578,649
" " Nord				2,736,649
" to other parts of France				4,419,961
" to foreign countries				287,354
Total sales				8,972,613
Used at the mines				742,020
Stock, December 31, 1892				195,339
Total				9,909,972
Stock, December 31, 1891				83,348
Raised in 1892				9,826,624
Total				9,909,972

The conveyances by which it left the mines were as follows:—

Description.				Quantity.
				Tons.
Despatched by rail				5,172,493
" canal				8,374,206
" carts				125,914
Total				8,972,613

NORD.

In the following table will be found details as to hands employed, wages, and accidents in the mines in the department of the Nord for the years 1890-92:—

		1890.	1891.	1892.
Hands employed under-ground	Number ..	15,251	15,873	16,112
Hands employed above-ground	" ..	4,323	4,729	4,697
Wages paid	Amount £	1,014,996	1,069,760	1,028,441
Deaths through accidents	Number ..	13	26	23

The following table gives the estimated quantity of coal consumed in the department of the Nord, and the mines from whence it was obtained during the past 3 years. The quantity is on the decrease: probably this is attributable to slack trade, but I would call attention to the rapid and marked decrease in the quantity of British coal used:—

Mines whence Obtained.	Quantity.		
	1890.	1891.	1892.
	Tons.	Tons.	Tons.
Department of the Nord ..	2,362,760	2,349,675	2,213,711
" Pas-de-Calais ..	2,511,112	2,419,070	2,705,446
Belgium	1,214,994	1,812,966	1,135,493
Great Britain	91,006	33,048	5,399
Germany	5,790	3,280	4,330
Total	6,185,662	6,118,039	6,064,379

The communal and private turf bogs in the Pas-de-Calais are Turf. situate in the district of Montreuil, along the valley of the Canche, in the plain of Airon, and on the right bank of the Authie, except those of Condette and Ponchel, the former of which is in the valley of the Becque in the district of Boulogne, and the latter in the valley of Authie in the district of San Pol.

The summer of 1892 was favourable for the cutting of turf: at Condette 1,080 cubic metres were cut, against 556 cubic metres in the previous year; at Ponchel, as in 1891, only some 26 cubic metres were cut.

In the district of Montreuil 16 communes asked and obtained permission to cut turf in 1892; but it seems two communes—those of Marles and Madeleine—did so without first complying with this formality, the engineer consequently reported their misdoings to the Préfet. The total yield of these communal bogs was about 9,510 tons.

In the department of the Pas-de-Calais during the year 1892 Quarries. there were about 70 underground quarries in work, affording occupation, on an average, to 280 workmen, and 260 open quarries, employing 1,200 workmen.

The most important quarries are those for phosphates. Amongst these the most numerous and the most productive are those in the commune of Orville, which yield sand rich in phosphates, and occasionally an underlayer of phosphatic chalk.

In 1892 this group comprised 250 open quarries employing 520 workpeople, and an underground one employing 24 workpeople.

The deposit of phosphates which was discovered at the beginning of the year 1891 to the north-west of Auxi-le-Chateau was more extensively worked; six open quarries, giving employment to 105 workmen, were opened in the course of the year 1892.

The group of phosphate quarries at Pernes-en-Artois now consists of only one underground affording employment to 15 men, and three open ones employing 14 men; finally in the Boulonnais group there were 70 workings by small shafts, employing 206 workmen, and 20 open workings, with 165 workmen.

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About 133,000 tons of phosphates were extracted in 1892. against 157,000 tons in the previous year.

The most important quarries, besides those for phosphates, are those for sand or gravel at Labeuvrière, Berquette, and Arques; those for marble and limestone in the Valley Heureuse, and those for cement at Devres, Neufchatel, &c.

Some rather important quarries for stone for metalling have been opened in the communes of Bengin, Rebreuve, and La Comte.

During 1892 four accidents in quarries formed the subject of investigation by the Mining Department; by these accidents one person was killed and four wounded.

The following table gives statistics relating to the quarries in the department of the Nord during the year 1892:—

Description of Quarry.	Underground Workings.		Open Workings.	
	Number.	Workmen.	Number.	Workmen.
Marble	..	..	58	140
Sand	..	..	233	468
Limestone	85	128	172	547
Stone for paving and building	4	13	205	624
Flint	..	..	51	88
Marl and clay	2	9	71	212
Total	41	160	788	2,069

The phosphate deposits at Quiévy, Viesly, Briastre, and Neuville were not worked in 1892.

Four accidents were reported in 1892; these caused the deaths of two workmen and injury to two others.

The underground quarries are mostly situated in the vicinity of Lille, at Faches, Haubourdin, Hellemmes, Lesquin, Lezennes, Loos, Phalempin, Seclin, and in the vicinity of Valenciennes at Ribécourt, Vendegies-sur-Ecaillon, Petite Forêt de Raismes, La Sentinelle, St. Saulve, Hordain, and Avesnes-le-Sec.

Public Works.

Calais
harbour.

With regard to the interior of Calais Harbour, I have only to supplement my report of last year by stating that the quay walls have been completed, and the inside of the harbour itself deepened and cleared.

With regard to the entrance, which is of such vital importance, I regret having nothing satisfactory to report. The progress made last year with the foundations of the New East Pier was by no means what it might have been. A plan of the pier, as it is to be, accompanied the report I made in March, 1891, when I

gave full particulars, and stated it was expected to be completed this spring. For some time past the repairing of the woodwork of the old East Pier has been much neglected, presumably because it was considered sufficiently strong to last until the new one was completed. This calculation has proved erroneous, since on the morning of November 19 last, during a heavy gale from the north-east, the sea carried away the platform forming the end or head of the East Pier, with the small lighthouse, signal masts, sheds, &c., which were erected thereon, together with some length of the pier itself, leaving the stone foundations and remains of the piles as a danger to ships entering the port. It needs no words of mine to show that the loss of the protection to the entrance which was afforded by the end of the East Pier cannot render the entrance safer, nor improve the accessibility of the port, and in the interest of the harbour it is to be hoped that something will be done. It is now again affirmed that the works of the new East Pier will be pushed on; contracts have been made, and it is to be completed in three years. There is no doubt it could be completed and the wreckage of the old pier removed within that period, and even sooner, but all depends on how the works are pushed on and the number of hands employed.

More vessels now avail themselves of the dry dock, and the Dry dock. mail packets continue to use it.

Vice-Consul Surplice has furnished me with the following observations on the port of Boulogne:—
Boulogne harbour.

“Dredging has been carried on regularly during the past year in the deep sea harbour, over a surface of about 33 acres. There is actually an anchorage of a depth of 29 feet at low water spring tides. The surface sheltered by the south-west breakwater from the westerly winds extends to about 85 acres, and over 30 acres of this there is a depth of 33 feet low-water spring tide.”

“The new quay wall on the Quai Gambetta side of the inner harbour is now completed as far as the bridge ‘Marquet,’ the length originally proposed—that is, 1,200 feet—and the obnoxious mud bank that previously existed in front of the fish market (‘Halle au Poisson’) has been entirely dredged away.”

General Remarks.

I have commented so fully in previous reports on the Channel channel passenger service that there remains little more for me to say, further than to record the number of passengers at Calais and Boulogne during the past year, which I do in the following table:—
passenger service.

Year.	Calais.	Boulogne.	Remarks.	The Boulogne Figures include the following Number of Passengers by Dutch-American line.
	Number.	Number.		
1887	235,695	128,145	..	..
1888	248,001	120,021	..	..
1889	346,934	127,430	Paris Exhibition	2,581
1890	262,364	106,604	..	6,733
1891	258,465	109,285	..	10,347
1892	248,347	113,765	..	8,512
1893	228,329	113,436	..	6,787

As regards Calais, it will be seen that the number of passengers who availed themselves of that route again shows a falling-off; in fact, the numbers have been steadily decreasing since 1890. Some say that this is owing to the financial difficulties of the last few years having rendered it necessary for many to economise and forego their Continental trip. This, no doubt, may be, and probably is, the cause for a portion of the decrease, but I am inclined to think that the increased facilities and cheaper fares offered by the rival routes have much to do with the decrease. There is no doubt that passengers for Germany and the north-east of Europe no longer use this route to the same extent as formerly. This can be seen by the much smaller number arriving and leaving by the Brussels express trains.

There are now three services each way daily, instead of four, as the club service was discontinued on October 1 last. The numbers availing themselves of it having decreased rather than increased, the companies very wisely gave it up. I believe it never paid. That it was not more patronised may be explained—firstly, by the extra charge; and, secondly, by the fact that the largest steamers were not run in connection with this service.

When the entrance to the port is finally completed it may then be safe to run such vessels at the hour fixed for the club service in all weather, which is not the case at present.

I may say that all passengers landing and embarking at Calais are to and from England; but this is not the case at Boulogne, and in the following table I give particulars of the passengers at that port in 1893:—

Description of Steamers.	Landed.	Embarked.	Total.
	Number.	Number.	Number.
South Eastern Railway Com- pany from Folkestone ..	39,641	45,131	84,772
Various, chiefly excursionists..	10,990	10,937	21,927
Dutch-American line	2,117	4,620	6,737
Total	52,748	60,688	113,436

The number credited to the South-Eastern Railway Company again shows a decrease of 1,752 for the last year, clearly showing that the Folkestone-Boulogne and Dover-Calais routes to the Continent are not for some reason patronised as much as formerly. The number of passengers using the Dutch-American line shows a decrease again, which is not surprising, as most of these were emigrants, but the total number of passengers is brought up to very near the total of the previous year by the increase in the number of excursionists. It was, no doubt, the fine summer which tempted more of the holiday-makers on our southern coasts to avail themselves of the facilities offered by the excursion steamers for a trip across the channel, and of the opportunity of indulging in a visit to foreign parts, though of very limited duration.

In Annex VII. I give a table showing the result of four daily Wind. observations as to the direction of the wind last year.

The tons given in this report are all of 1,000 kilos. (equal to **Weights**. 2,204 lbs. avoirdupois), and exchange is taken at the rate of 25 fr. to the *l.*

P.S.—Since writing the above I have been furnished with **Jute trade**. some particulars respecting the jute trade in the north of France which may not be devoid of interest.

As far as I can ascertain, the spinning of jute dates, for France, from 1845-46, when a firm at Ailly-sur-Somme joined it to their other spinning. This new trade was inaugurated by a Scotch gentleman who eventually took up the concern. About the same time (1847) an English firm began to spin this fibre in Dunkirk, and the industry has gradually increased up to the present time, when the consumption for France reaches about 310,000 bales per annum at the least and possibly is rather more.

The consumption of the principal European centres is about as follows :—

Country.						Quantity.
						Bales.
Dundee	..	..	..	..	..	1,100,000
France	..	..	..	..	..	310,000
Germany, Austria, and Bohemia	..	..	..	..	..	550,000
Belgium	..	..	..	..	..	75,000
Russia	..	..	..	..	..	50,000
Italy	..	..	..	..	..	60,000
Spain	..	..	..	..	..	40,000
Total	..	..	..	..	..	2,185,000

To which must be added Sweden, Norway, Switzerland, &c. The French consumption of 310,000 bales (minimum), at $5\frac{1}{2}$ bales per ton, gives a total yearly consumption of 56,500 tons, which valued at 13*l.* per ton, as a mean, represents 734,500*l.* for the raw material.

Taken on an average season, jute varies in price, according to quality, from 9*l.* to 18*l.* per ton; but although this represents the extremes of value the great bulk of the crop consists of marks called "first natives," and these would stand at about 13*l.* per ton on the above supposition.

It would be difficult to state the position of the trade for 1893, taking the year from January 1 to December 31, because the "jute year" is generally looked upon as extending from the middle of August of one year to the same date of the following year, the latter half of August being the time when the new crop arrives on the Indian markets.

The available supply for the European markets for the last 4 years was as follows:—

Crop of—						Quantity.
						Bales.
1890-91	..	..	..	..	..	2,636,000
1891-92	..	..	..	..	..	1,622,000
1892-93	..	..	..	..	..	2,443,000

For the first 7 months of the present crop (1893-94) ending February 28, 1894, the exports to Europe have reached 1,922,000 bales, whereas for the same period of the previous crop (1892-93) they amounted to 2,188,000 bales. So far, therefore, the present crop is less than the previous one by 266,000 bales, and to all appearance the crop is exhausted.

The crop 1892-93 which was 2,443,000 bales was looked upon as just sufficient for the consumption, and I think this was the case, because although I make out the European consumption to be 2,185,000 bales, there are other countries besides those mentioned that consume this article so that the crop 1892-93 may really be looked upon as leaving no excess.

Crop 1890-91 was in excess of the requirements and left a surplus at its close.

Crop 1891-92 was considerably below the needs, and prices rose high as it was supposed there would be a dearth before the arrival of the following crop, but with rising prices the consumption was restricted and machinery was stopped so that prices of "first natives" which rose to 19*l.* in May, 1892, fell in June, July, and August until they reached 13*l.* This tremendous fall was most ruinous to manufacturers who had bought largely, expecting prices would maintain themselves until the arrival of the new crop in Europe in the first half of October. The fact of a surplus having been left from crop 1890-91 appears to have been lost sight of in the excitement, and this, along with the reduced consumption, owing to high prices and the rumours of a good crop for 1892-93, caused this unexpected and unprecedented collapse of prices. Nevertheless, the crops of 1890-91 and 1891-92

together were barely sufficient for the consumption, and there certainly was no visible stock left to begin the year 1892-93.

This 1892-93 crop, which was to be such an immense one, proved after all to be only a normal one, and as stocks were nil, the prices kept pretty steady, rather higher in fact than usual, the close of the year was looked forward to with some anxiety as to how the present crop would turn out, it was announced in July last that floods had occasioned serious damage, and that the 1893-94 crop would turn out below the average; these adverse reports were not looked upon as trustworthy, but only as "canards" got up with the object of raising prices. As time went on, however, there could hardly be a doubt that matters were serious, and that the crop would prove inadequate to the demand which had been steadily increasing, and such has proved the case. The supplies arriving from India are not only smaller than they ought to be, but quality has fallen considerably. This coupled with the reduced demand, which is a consequence of high prices, makes profits next to impossible. "First natives" which stood at 13*l.* in September, 1893, gradually rose until December last when they reached 16*l.* 5*s.* or more. Since then, owing to the rapid fall in silver and the reduced consumption, prices have fallen rapidly, and at present "first natives" stand at 13*l.* 15*s.*

The Dundee trade has for the last 2 years been bad. The American markets both north and south are practically closed. The prohibitive duties of the north, the financial difficulties of the south and their constant state of warfare have completely paralysed the Dundee trade. On the other hand the producing powers of Calcutta, from a manufacturing point of view, have become so great that they virtually command the export trade. The mills there enjoy such immense advantages from cheap labour and long hours that they have sprung up like mushrooms, and already their consumption exceeds that of the mother country by several hundreds of thousands of bales per annum.

But to come back to France, the trade there during the last 12 months has certainly not been as bad as I am led to believe it has been in Scotland; but although the former is protected by her tariff and safe from importation, the state of affairs in Dundee does react upon France to a very marked extent. It is hardly possible for business to be profitable here when it is bad in Dundee. When yarn is being "given away" in Scotland, the trade cannot pay remunerative prices in France, and it must not be forgotten that although France is protected by customs duties, French production is, if anything, in excess of the demand so that it becomes necessary to export part of the produce in order to keep prices remunerative. This is done by sending to Dundee and other places fine yarn, which can be placed on those markets with advantage, although the same could never be said of the coarser numbers in the production of which they are by far the masters.

The distressing state of Scotch trade has to a fair extent
(1691)

reduced this export of French fine yarn, and the consumption in France, owing to high price of raw material, having become restricted, spinners are now producing more than the demand, and as a consequence prices are lower than is compatible with a profit to them.

It may be said, as a rule, that during the last 2 years profits have been nil! The fluctuations in the prices of the raw material have been so sudden and unexpected that buyers of yarn have become very cautious, and spinners who cannot stop their mills have often had to buy dear jute, which, turned into yarn, has been sold later on at ruinous prices. The trade during the last 3 or 4 years appears to have lost the steadiness it formerly enjoyed, and has become a kind of speculative business wherein those who succeed in buying at the right moment make money, whereas others less fortunate lose heavily. In trying to form a sober judgment as to the prospects of the trade, even the most experienced and trustworthy men have been at fault in spite of their large experience. Two months ago it was positively asserted that before next June "first natives" must stand at 18*l*. and possibly at 20*l*., whereas the recent fall renders such an idea untenable at present. There is no doubt that the present crop will be considerably below an average one, but bad trade and a reduced output will probably allow spinners to eke out what they have until the next crop makes its appearance.

As regards the uses to which jute is applied, these are so numerous as to defy enumeration. Undoubtedly its most extensive use is the production of bags of all descriptions and for all purposes. Then it is largely used in upholstery, the making of cordage, carpets, and for packing goods. In fact it is difficult to say where its use ceases as it is employed in the manufacture of all manner of goods.

Annex I.—RETURN showing the Principal Articles of Import
at the Port of Calais during the Year 1893.

Articles.	Quantity.
	Kilogrammes.
Fresh meat.	334,952
Wool, raw	20,230,281
Silk	86,467
Cereals	39,813,047
Sugar, &c.	22,175
Condensed milk	730,620
Coffee, tea, and spices	244,080
Oils, various	128,515
Timber	139,645,335
Vegetable fibres	6,444,865
Yeast	462,958
Rags.	554,317
Wood-pulp	2,224,066
Slates	280,458
Ice	2,397,849
Coal.	51,951,838
Mineral tar and bitumen	437,079
Petroleum	12,673,065
Iron ore	45 970,600
Pig iron	4,257,420
Iron, plates, wire, &c.	590,188
Chemical products.	442,315
Yarns of flax, cotton, and wool	480,589
Tissues of flax and cotton	271,089
" wool	216,729
" silk and hair	87,186
Machines, &c.	977,860
Works in metal, various	239,713
Beer	178,421

**Annex IV.—RETURN showing the Principal Articles of Export
at the Port of Boulogne during the Years 1892–93**

Description of Goods		Quantity.	
		1892	1893.
Portland cement	Tons	31,963	38,647
Eggs	"	1,000	1,000
Herrings dried, smoked, salted	"	697	824
Fresh sea fish	"	433	2,900
Potatoes	"	2,900	3,800
Dried vegetables	"	81	13
Fresh fruits, of all kinds	"	7,802	15,628
Seeds for sowing	"	126	162
Rags	"	1,228	2,834
Wine and liqueurs	Gallons	1,409,782	1,417,576
Brandy and other spirits	"	16,214	13,415
Pottery and porcelain	Tons	1,469	805
Glass, bottles, &c.	"	8,702	8,842
Tissues			
Silk (tulle)	"	..	1
" others	"	154	169
Linen or hemp	"	61	13
Wool	"	8,053	6,244
Cotton (tulle)	"	1	1
" others	"	72	194
Silk in cocoons raw, or thrown	"	112	37
" of all kinds	"	78	42
Paper	"	444	470
Prepared skins	"	882	1,550
Articles in skin or leather	"	136	370
Works in metal			
Cast iron	"	75	26
Copper, pure or alloyed	"	98	156
Other than above-named	"	384	843
Articles in indiarubber (caoutchouc)	"	13	26
Haberdashery and fancy articles	"	1,772	2,996
Gold coin	Ounces (troy)	..	1,548
Silver	"	18,936	11,147
Total tons		127,524	133,977

Annex V.—RETURN of all Shipping at the Port of Calais during the Year 1893

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	27	6,261	1,459	353,968	1,486	360,229
French ...	12	1,085	662	174,375	674	175,460
Russian ...	18	7,736	...	...	18	7,736
Swedish ...	8	3,243	10	3,728	18	6,971
Norwegian ...	42	17,200	21	11,706	63	28,905
Danish ...	2	388	6	5,299	8	5,687
German ...	3	3,268	12	6,612	15	9,880
Italian ...	1	492	...	...	1	492
Belgian ...	...	...	1	465	1	465
Spanish ...	...	...	1	838	1	838
Chilian ...	...	...	1	7	1	7
Total ...	113	39,673	2,173	556,997	2,286	596,670
Coasting ...	34	3,002	2	2,620	36	5,622
Grand total ...	147	42,675	2,175	559,617	2,322	602,292
Total for the year preceding ...	169	32,998	2,277	581,533	2,446	614,531

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	31	3,950	1,457	344,601	1,488	348,551
French ...	11	1,199	663	180,052	674	181,251
Russian ...	17	7,324	2	471	19	7,795
Swedish ...	8	2,883	10	3,788	18	6,671
Norwegian ...	41	16,605	18	10,355	59	26,960
Danish ...	3	1,063	7	5,978	10	7,041
German ...	3	2,968	12	6,612	15	9,580
Belgian ...	1	14	1	465	2	479
Dutch ...	1	26	...	...	1	26
Italian ...	1	492	...	...	1	492
Spanish ...	...	...	1	838	1	838
Total ...	117	36,464	2,171	553,190	2,288	589,654
Coasting ...	34	2,961	...	...	34	2,961
Grand total ...	151	39,425	2,171	553,190	2,322	592,615
Total for the year preceding ...	175	36,047	2,239	572,880	2,414	608,927

**Annex VI.—RETURN of all Shipping at the Port of Boulogne
during the Year 1893.**

ENTRÉES.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	33	11,408	1,513	361,346	1,546	372,754
French	37	3,560	6	2,323	43	5,883
Russian	5	2,098	...	...	5	2,098
Swedish	4	1,189	...	...	4	1,189
Norwegian ...	34	8,941	9	3,862	42	12,803
Danish	7	1,236	...	...	7	1,236
German	2	1,630	...	...	2	1,630
Dutch	...	...	119	281,219	119	281,219
Belgian	...	...	3	1,295	3	1,295
Total	121	29,722	1,652	656,427	1,773	686,149
Coasting	571	65,970	178	61,667	749	127,637
Grand total ...	692	65,692	1,830	712,094	2,522	778,786
Total for the year preceding ...	700	60,120	1,845	702,779	2,545	762,899

CLÉARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	40	13,817	1,518	332,397	1,558	346,214
French	15	3,611	11	6,965	26	10,576
Russian	5	2,098	...	...	5	2,098
Swedish	4	1,189	...	...	4	1,189
Norwegian ...	35	11,489	9	4,253	44	15,742
Danish	8	1,637	...	...	8	1,637
German	1	947	3	1,489	4	2,436
Dutch	...	...	119	281,219	119	281,219
Belgian	...	...	5	2,100	5	2,100
Austrian	...	...	1	708	1	708
Total	110	34,128	1,666	628,371	1,776	662,499
Coasting	661	52,542	177	58,684	838	111,226
Grand total ...	771	86,670	1,843	687,055	2,614	773,725
Total for the year preceding ...	761	66,652	1,838	700,284	2,599	766,936

Annex VII.—TABLE showing the Direction of the Wind at Calais in 1893 (Four Records being made Daily, namely, at Daylight, Noon, Sunset, and Midnight).

Wind.	January.	February.	March.	April.	May.	June.	July.	August.	September.	October.	November.	December.	Total Ob- servations in 1893.	Total Ob- servations in 1892.	Total Ob- servations in 1891.
W.S.W.	5	16	6	8	12	19	15	30	7	13	22	5	158	154	201
S.W.	7	18	13	2	1	7	7	8	21	8	11	..	103	109	78
S.S.W.	20	30	17	..	22	7	30	19	26	27	4	30	223	227	227
S.	4	9	2	..	4	2	3	5	7	3	..	14	59	36	50
S.E.	4	4	2	..	2	1	3	2	3	18	7	..	63	94	117
N.	4	1	30	1	6	3	8	9	3	7	14	11	96	116	72
N.N.W.	12	1	6	2	12	3	4	5	8	9	2	2	51	75	49
N.W.	13	7	4	4	11	7	6	11	6	13	6	26	108	98	81
N.N.W.	..	1	13	1	12	3	7	7	8	13	1	..	61	69	72
N.N.E.	..	1	..	5	12	1	7	7	3	4	4	6	49	41	38
N.E.	13	4	4	23	23	30	3	6	14	..	9	1	135	115	82
E.N.E.	13	1	..	19	13	16	4	6	7	..	9	2	80	83	66
E.	12	6	10	23	17	11	18	5	4	4	16	3	119	123	145
E.S.E.	..	2	11	10	1	5	..	..	6	..	4	..	82	122	41
S.E.	5	7	11	18	3	6	..	6	3	..	7	12	79	115	90
S.S.E.	17	4	1	8	3	3	1	..	..	..	4	1	25	39	31
Number of Ob- servations ..	124	112	124	120	124	120	124	124	120	124	120	124	1,460	1,464	1,460

CALAIS.

AGRICULTURAL REPORT.

General
remarks.

Some wheat suffered from the frosts in January. At the end of March the grain crops in the Pas-de-Calais were reported to be in a very good state, but in April want of rain was beginning to be felt; autumn wheat still looked well, but spring wheat had come up badly. Early sown beet did well, but the drought interfered with late sowings and the grass and green crops began to suffer; a few days' rain towards the end of May did good, and when the rains came in July the showers were not heavy but frequent, and the weather extremely favourable for all crops which had suffered much from the previous drought: grass recovered, lucerne, clover, &c., improved considerably. The harvest which was early for all kinds of grain was fairly good both in quantity and quality, but the yield of straw was very poor. Oats were small and irregular. Rye was a good crop and so were potatoes. Beetroot was very irregular, some fine fields, others very patchy and some quite lost; the weather was favourable for gathering in the roots, which proved good in saccharine richness.

Autumn sowings were completed under favourable conditions in spite of delay caused by the beet crop having been gathered late.

The monthly reports, from which I have obtained the above information, describe the prospects of agriculture at the end of December as very favourable all round.

Information furnished me from another source as to the grain crops in the north of France, states that the wet weather in February and beginning of March seriously interfered with spring sowings, and for this reason less land was sown with grain; the prolonged drought which followed was injurious to its regular growth and development, but the crop was equal to that of the previous year, which however had not been anything extraordinary.

In spite of causes which might be harmful to growth in many districts, the average yield exceeded 30 hectolitres the hectare (33½ bushels per acre). In the arrondissement of Douai, for example, winter wheat yielded 38 hectolitres and spring wheat 35 hectolitres (42 and 39 bushels per acre), but the yield was very variable.

In the Somme, the grain is stated to have been smaller, of poor colour and less regular than usual. The result of the wheat crop in the three departments included in my district is roughly estimated to have been as follows:—

Department	1893.	
	Area	Quantity
	Acres.	Quintals.
Nord	287,176	1,092,664
Pas-de-Calais	412,689	1,296,000
Somme	391,479	969,481

Nord.—In Annexes Nos. 1 to 3 of this report I give the usual tabulated information relative to the crops in the department of the Nord in 1892, as compared with the previous year. It will be observed that there is a decrease in the extent of land sown with grain generally, but specially with wheat, and for the purpose of comparison I have added the extent of land under grain crops in 1890; but the average yield showed a considerable improvement, the totals for wheat, rye, and barley being greater in spite of the decreased area sown. Wheat yielded 24·36 hectolitres per hectare or about 27 bushels per acre, against about 24 bushels in 1891 and 27½ bushels in 1890. Details as to crops.

Barley yielded 39·47 hectolitres per hectare or about 44 bushels, against 43 bushels and 46 bushels respectively.

Oats yielded badly giving only 46·53 hectolitres per hectare or nearly 52 bushels per acre, against 58 bushels and 54 bushels respectively.

Information as to the number of animals on farms in the Nord will be found in Annex No. 4. The mortality amongst animals was larger than usual.

Pas-de-Calais.—I regret being unable to give the usual statistics as to crops and market prices in the Pas-de-Calais, but the official Annuaire of the department, from which I have always obtained this information, has not yet been published, and as it now appears doubtful whether it will be this year, I have decided not to delay my report any longer for this information, as it would take time to obtain it from other sources.

Diseases Amongst Animals.

Pas-de-Calais.—The veterinary surgeon for this department in his report for the twelvemonth to June 30, 1893, gives fuller information than is elsewhere obtainable on the diseases amongst animals; he states that foot-and-mouth disease raged during the whole period under review, and I think the following information extracted from his report may prove of interest. Diseases amongst animals.

Glanders only occurred in four stables, situate in four different communes of the department. Glanders.

The veterinary surgeon states that pleuro-pneumonia, which for many years has been the scourge of agriculture in the department, now appears only from time to time. During the twelvemonth under review but 47 cases were verified, or hardly a twelfth of the number which occurred before the promulgation of the Law of 1881 and the organisation of the sanitary service. The largest number of cases occurred in the district of St. Omer, where it also proved most difficult to master it. Pleuro-pneumonia.

I think I cannot do better than give translated extracts from the veterinary surgeon's report:—"Foot-and-mouth disease, which happily appears coming to an end, has occasioned losses which may be estimated at a minimum of 100,000,000 fr. (4,000,000*l.*) for the whole of France, and at 8,000,000 fr. (1691) Foot-and-mouth disease.

(320,000L.) for the Pas-de-Calais alone, this malady having attacked at least two-thirds of its cattle, which on December 31 1891, numbered 225,977 horned animals, 200,761 sheep, 149,544 pigs, 25,177 goats.

"This foot-and-mouth disease, which we have been combating for nearly 15 months, is not endemic; . . . it is on the contrary distinctly epidemic—that is to say, it is propagated entirely by contagion; it spreads wherever it has the opportunity, however good may be the health or sanitary condition of the animals liable to the attacks.

"This disease was brought to us from the north-east, as is nearly always the case, and it had, from the first, so marked an epidemic character and spread so rapidly that in the departments of the Nord, the Somme, and the Pas-de-Calais, the closing of the markets was demanded almost simultaneously.

"For 2 years this disease had menaced our eastern frontier, without being able to cross it, since it is not conveyed by dead meat, but the day following February 1, 1892, the date on which foreign live cattle were allowed to enter France, German and other sheep brought the foot-and-mouth disease in their feet or upon them—that is, in their fleeces."

He goes on to say that besides the danger coming from beyond the frontiers, on which he enlarges, there is the danger arising from animals leaving the market of La Villete, which he describes to be now, as formerly, a regular focus of infection, and he sums up as follows:—"The sources of the evil are sufficiently known, and if we do not wish to deceive ourselves and put aside the remedy, it is necessary, firstly, to close the frontier absolutely and definitely to all live animals, such as cattle, sheep, pigs, or goats; secondly, to order that all such animals leaving La Villete are only to leave it for the slaughter-houses; they should be sent there as quickly as possible, and their admission to provincial markets should be forbidden."

Tuberculosis

Tuberculosis amongst live animals was only reported as existing in five communes, but the veterinary says it must not be concluded from this that but few animals were attacked, since the number of cases duly reported or discovered after the animals are killed in those public slaughter-houses which are subject to sanitary inspection are far less numerous than those which escape all examination in slaughter-houses which are not supervised. He says that it is to these latter that most animals suffering from tuberculosis are sent, and the meat thus enters freely into consumption, since owners, instead of sending doubtful animals where they may be confiscated, have them slaughtered where they are not subject to indiscreet supervision.

Anthrax.

"Fièvre charbonneuse ou charbon bactérien" was localised in four communes in the district of Arras. In the communes of Ecoust-St.-Mein ten cows and one horse died from it on one farm. The veterinary goes on to state that "charbon symptomatique ou bactérien" has no resemblance to the foregoing disease, it occurs, he says, more particularly in the district of St. Pol; but last

year it also appeared in the district of St. Omer, but it did not spread.

Swine fever, which raged with violence for some years in the district of St. Pol, Montreuil, and Boulogne, where the breeding of pigs is carried on, decreased considerably, and in a few places only were isolated cases reported. He states that "pneumotéríte infectieuse ou fièvre typhoïde" of pigs, which is a more serious malady than "rouget," or swine fever, nearly disappeared, having only been reported in two communes, where the isolation of the infected animals and disinfection, rigorously carried out, prevented the spread of the disease.

He speaks as though many cases of rabies have occurred; ^{Rabies.} there is no doubt that cases of hydrophobia among dogs have frequently been reported, and regulations issued in accordance with the law to prevent dogs being allowed to go about loose for various periods; but these regulations have been applied in this part in so spasmodic and partial a manner as to make them worthless.

Nord.—I have extracted the following information from the 1892 report of the veterinary surgeon for the department of the Nord.

There were 156 outbreaks of pleuro-pneumonia; these occurred ^{Pleuro-pneumonia.} in 145 different communes; 225 cattle were affected and slaughtered, which shows improvement since 628 animals had been attacked and slaughtered in 1891.

Foot-and-mouth disease raged with exceptional severity; it ^{Foot-and-mouth disease.} occurred in 404 communes (there are 666 communes in the department). 2,476 stables were contaminated, and 42,960 animals fell victims to it, causing a loss to agriculture which is estimated at 60,000*l*.

Seventeen horses were slaughtered owing to glanders, namely, ^{Glanders.} ten in the district of Lille, one in that of Valenciennes, and three each in the districts of Cambrai and Douai; this is an increase, as during the two previous years the numbers had been nine and seven.

"Charbon bactérien ou fièvre charbonneuse, ou sang de ^{Anthrax.} rate," was verified by post-mortem examination, and confirmed by the microscope, in the case of 25 cattle in 13 different communes or parishes.

"Charbon bactérien," also called "Charbon emphysémateux ou symptomatique," only occurred in the district of Avesnes, 13 beasts were attacked, and all died.

The veterinary states that tuberculosis is still widespread, ^{Tuberculosis.} but that it is impossible to give exact statistics as to the animals attacked; most of the information obtained coming from the communal slaughter-houses, whilst information is rarely received from the private ones, to which the greater number of animals affected by tuberculosis are sent.

Few cases of swine fever occurred in the Nord; 12 pigs only were recognised as suffering from it, but they all died; these cases occurred in four communes—viz., Lille, 5; Avesnes, 4; Dunquerque, 2; and Valenciennes, 1.

(1691)

Enteric
pneumonia.

"Pneumo-entérite infectieuse." One outbreak occurred in the district of Avesnes; five pigs died, and one pig died from this malady in the district of Douai.

Rabies.

Cases of rabies occurred in 29 communes; 42 dogs and five horses suffered from it. Ten adults and two children who were bitten were sent to Pasteur's Institute in Paris. All the dogs attacked were killed, and the five horses died paralysed; 142 dogs which had been bitten were killed.

General Remarks.

General
remarks on
diseases
amongst
animals.

As I have before reported, it is extremely difficult to obtain at the time any reliable information as to the diseases existing amongst animals, though one often has reason to believe that much disease does exist; this opinion is always confirmed when the yearly reports of the veterinary surgeons are published, and I have given above extracts from their reports for the departments of the Pas-de-Calais and the Nord; it is very evident foot-and-mouth disease proved a veritable scourge, that other diseases existed to a very considerable extent, and that the sanitary condition of cattle left much to be desired; moreover a perusal of these reports only confirms my opinion that very many cases of disease are not reported. This is clearly stated by both veterinaries to be the case with regard to tuberculosis, and I see no reason for assuming that alacrity is shown in reporting other kinds of disease—rather the contrary.

Annex. I.—ACREAGE and Yield of Land under Grain in the Department of the Nord in the Years 1891-92.

Nature of Grain.	1890.		1891.		1892.	
	Number of Hectares Sown.	Number of Hectares Sown.	Total Yield.		Number of Hectares Sown.	Total Yield.
			Grain.	Straw.		
			Hectolitres.	Quintals.		Hectolitres. Quintals.
Wheat	139,351	117,992	2,565,729	4,494,850	114,948	3,242,404 4,257,544
Wheat and rye, mixed	1,359	484	12,373	14,105	254	4,206 1,416
Barley	9,991	7,930	163,787	330,839	6,599	228,622 284,187
Oats	10,329	9,204	358,370	296,937	9,373	369,978 240,415
Buckwheat	10	8	160	200	2	48 56
Rye	54,639	61,803	3,244,611	2,180,507	56,399	2,624,706 1,605,670
Millet	95	91	1,825	2,095	181	3,685 5,403
Maize	...	...	...	...	249	5,365 5,681

Annex 2.—RETURN showing Acreage, Yield, and Value of Crops, other than Cereals, in the Department of the Nord during the Years 1891–92.

Nature of Crops.	Number of Hectares Sown.		Yield in Quintals.		Value of Crops.	
	1891.	1892.	1891.	1892.	1891.	1892.
Sugar beet	35,085	41,045	9,272,875	10,845,915	£ 883,080	£ 1,188,520
Other beet	16,788	18,086	3,294,514	9,649,092	479,524	702,339
Potatoes	21,345	20,806	1,258,646	3,368,931	411,868	640,223
Artificial pasture, clover, lucerne, sainfoin, &c. ...	27,890	27,196	1,302,339	1,287,078	452,220	467,894
Green crops (fourrages annuels) ...	22,360	6,613	1,654,731	201,579	364,041	53,270
Temporary pasture (rye-grass, &c.) ...	392	484	56,488	23,106	5,036	4,805
Pastures naturels ⁽¹⁾ prés ...	34,146	45,676	1,365,909	896,565	266,264	322,917
Grass (herbages) ...	20,735	23,820	707,866	324,809	98,882	674,113
Tobacco	569	554	15,234	14,972	48,748	45,516
Hops	771	871	7,997	11,541	42,652	85,560
Hemp	103	94	...	...	...	...
Tow	...	...	900	834	2,825	2,696
Grain	...	...	1,074	541	554	267
Flax	4,133	2,970	...	...	...	...
Tow	...	...	34,295	33,130	125,640	89,965
Grain	...	...	26,158	20,786	26,933	19,975
Colza	629	1,076	10,876	18,159	12,325	20,147
Poppy	1,380	1,187	16,422	12,249	25,022	20,333
Camelina	426	438	4,703	3,686	4,220	3,011

Annex 3.—RETURN showing other Farm Produce in the Department of the Nord during the Years 1891–92.

1891.

Nature of Produce.		Total Production.	Total Value in Sterling.	Average Value in Currency.
Milk	Hectolitres	4,218,143	£ 2,967,186	Fr. c. 17 59
Wool	Quintals ..	10,441	44,647	106 80
Bees (4,392 hives)—				
Honey	Kilos. ..	15,758	1,114	1 76
Wax	” ..	12,693	1,515	2 99

1892.

Nature of Produce.		Total Production.	Total Value in Sterling.	Average Value in Currency.
Milk	Hectolitres	5,065,350	£ 3,334,950	Fr. c. 16 46
Wool	Quintals ..	3,218	18,499	143 71
Bees (6,363 hives)—				
Honey	Kilos. ..	47,765	3,584	1 87
Wax	” ..	11,596	1,571	3 88

Annex 4.—TABLE giving Particulars as to the Animals on the Farms in the Department of the Nord.

Description.	Number existing on December 31		Number lost by Accident, Disease, or Age	
	1891.	1892.	1891.	1892.
Horses	89,877	82,074	1,692	1,672
Mules	2,977	2,114	39	33
Donkeys	2,093	1,935	38	36
Cattle—				
Bulls	5,892	6,277	134	74
Oxen	11,757	11,271	144	31
Cows	167,720	167,314	2,766	2,947
Young stock ..	91,870	95,811	4,266	6,410
Sheep and lambs ..	39,553	88,572	2,113	3,684
Pigs	81,319	78,869	2,970	4,000
Goats	12,131	12,320	669	745

WEIGHTS AND MEASURES.

1 imperial quarter (British)	=	2.90 hectolitres (French).
1 hectare (French)		2.4711 acres (British).
1 hectolitre ..		2.7512 bushels ..
1		22.01 gallons ..
1 quintal ..		220.4 lbs. avoirdupois (British)
1 kilogramme (French)		2.2046 lbs.

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1894.
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N^o. 1334.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF THE CONSULAR DISTRICT OF
BORDEAUX.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1166.

Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1894.

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1894.

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FRANCE.

BORDEAUX.

Consul Ward to the Earl of Rosebery.

My Lord,

Bordeaux, February 28, 1894.

I HAVE the honour to transmit to your Lordship enclosed herewith my Annual Report on the Trade and Commerce of Bordeaux for the year 1893, to which is annexed a short Report on the Trade of Bayonne forwarded to me by Mr. Vice-Consul Leeson.

I have, &c.
(Signed) WILLIAM WARD.

Report on the Trade and Commerce of Bordeaux for the Year 1893.

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General Remarks.

General
review of
trade in 1893.

The general depression of commerce and industry which prevailed last year in all countries of the world, with very few exceptions, was naturally felt also in most branches of business in a more or less serious degree at Bordeaux.

Effect of
protectionist
measures.

The trade of this district, moreover, as in other parts of France, was unfavourably affected by the introduction of the new French customs tariff, by the abrogation of important commercial conventions and the consequent tariff war between France and several other countries, and by the uncertainty as to future legislation on economical questions, all of which events were due to the protectionist policy now adopted in this country.

Aggregate
volume of
trade the
same as in
1892.

Though, according to the statement of Bordeaux business men, the results of most transactions during the past 12 months at this port brought them but small profit, it will be seen from the subjoined statistics that the aggregate volume of the imports and exports at Bordeaux reached about the same figure as in the year 1892; but it should be added that, contrary to the previsions of protectionists, there was last year an increase in the imports and a decrease in the exports. The total number and tonnage of the sea-going vessels visiting this port in the year 1893 experienced a diminution compared with the figures for the preceding years.

Increase of
imports.
Decrease in
exports.

Vintage.

Whilst in some parts of France last year's abundant vintage appears to have been less of benefit than of disadvantage for the growers, owing to the difficulty, if not impossibility, of finding a market for their wines, the prolific yield of 1893 more particularly in the Bordeaux district must, especially under the otherwise unfavourable state of trade, be regarded as a satisfactory event for the vineyard proprietors (most of whom have already disposed of their large stock of 1893's), and also for the Bordeaux merchants who appear confident that, in view of their low price and generally fair quality, last year's wines will find ready purchasers.

Preponder-
ance of
British trade.

British trade with Bordeaux continued last year to maintain its preponderance, in so far as regarded the volume of imports from, and of exports to, the United Kingdom, compared with that of the import and export trade with other countries; and the total

tonnage of British vessels visiting this port in 1893 experienced an increase, whilst the tonnage of vessels under the French and nearly all other flags show a falling-off as compared with the preceding year. Considering the low rates of freight, it is, however, not probable that British shipowners can have derived much profit from this increase.

Increase in tonnage of British ships.

An International Exhibition of Industry, &c., is to be held at Bordeaux in 1895, which may possibly offer a favourable opportunity to some branches of British commerce and industry for extending or opening business relations with this part of France.

International exhibition in 1895.

Shipping and Navigation.

The total number of sea-going ships of all nations which entered the port of Bordeaux, in ballast or with cargoes, during 1893 was 1,703, which measured together 1,099,769 tons register. These figures, compared with those for 1892, show a diminution of 65 vessels, measuring together 17,224 tons. Excepting the ships under the British, Danish, Italian, and Austro-Hungarian flags, which experienced an increase of tonnage, the shipping of all the other nations enumerated in the two following tables show a falling-off last year both in number and tonnage, the most marked diminution having taken place in the ships under the French flag. I may, however, observe that the large difference appearing between the number and tonnage of the arrivals and of the departures of French vessels in the subjoined tables was owing to the fact that a large proportion of the sailing vessels entered here in 1893 under the French flag from the Newfoundland and Iceland cod-fisheries, but on clearing again from hence were bound for French ports; these latter are thus not mentioned in the following statement, which does not include vessels engaged in the coasting trade:—

Decrease in total tonnage in 1893.

Increase under British, Danish, Italian, and Austrian flags.

RETURN of all Shipping at the Port of Bordeaux during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.		Total ships entered in 1893.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British ...	30	15,487	680	507,088	710	522,525	
French ...	268	47,562	384	304,133	652	351,695	
Norwegian ...	24	13,837	77	42,676	101	56,513	
Swedish ...	3	845	30	16,943	33	17,788	
Dutch ...	...	...	46	46,433	46	46,433	
German ...	20	8,452	9	5,294	29	13,746	
Austro-Hungarian	8	3,287	20	20,932	28	24,219	
Russian ...	1	692	14	8,889	15	9,581	
Italian ...	6	2,402	...	...	6	2,402	
Danish ...	8	1,939	25	16,564	33	18,503	
Belgian ...	...	...	17	15,334	17	15,334	
Spanish ...	...	...	33	21,030	33	21,030	
Total ...	368	94,503	1,335	1,005,266	1,703	1,099,769	
„ for the year preceding ...	369	98,010	1,399	1,018,983	1,768	1,116,993	

CLEARED.

Total ships
cleared in
1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	26	1,982	680	507,348	706	509,330
French	162	30,641	464	211,700	626	372,341
Norwegian	26	16,848	78	46,666	104	63,514
Swedish	3	845	30	16,943	33	17,788
Dutch	...	...	17	48,560	17	48,560
German	19	8,632	9	5,234	28	13,866
Austria-Hungary	8	3,267	20	26,962	28	30,229
Russian	1	692	14	7,889	15	8,581
Danish	8	3,653	...	...	8	3,653
Portuguese	8	1,940	25	16,564	33	18,504
Polish	...	...	17	15,324	17	15,324
Spanish	...	...	33	27,620	33	27,620
Total	260	70,739	1,367	1,048,126	1,627	1,118,865
... for the year preceding	281	84,730	1,412	1,080,281	1,693	1,164,981

Comparative importance of tonnage of vessels under British flag. Share taken by the various countries in sea-borne trade with Bordeaux.

It will be seen from the above tables that the tonnage of the vessels visiting this port last year under the British flag was very nearly equal to the total tonnage of the vessels of all other nationalities, including French vessels.

About 30 per cent. of all sea-going ships arrived from and respectively sailed for ports in the United Kingdom. The countries ranking next to the latter, as regarded the importance of their sea-borne trade with Bordeaux last year, were the Argentine Republic, Spain, the United States of America, Austria-Hungary, Algeria, Russia (Black Sea ports), Senegal, Sweden, Netherlands, &c.

British shipping at Bordeaux in 1893. Increase in total tonnage of British ships entered and cleared in 1893.

With reference more particularly to British shipping, it is satisfactory to be able to report that the same experienced last year (as compared with 1892) a considerable increase in the tonnage both of the arrivals and of the departures, as will be gathered from the following figures. It will, however, also be observed that last year's figures still show a falling-off compared with those for the year 1887, viz. :—

Year.	British Ships Entered.		British Ships Cleared.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1887	840	534,558	834	536,207
1888	763	484,821	759	483,055
1889	767	501,254	759	492,168
1890	744	514,362	736	508,171
1891	733	517,934	731	516,287
1892	703	488,764	696	480,886
1893	710	522,525	705	518,620

British ships arrived off Pauillac.

Besides the above-mentioned British ships which ascended the river as far as Bordeaux itself, 53 British steamers, measuring

together 141,222 tons (against 57 steamers of together 140,941 tons in the preceding year), entered the River Gironde in 1893 at and below the outport of Pauillac.

These steamers belonged nearly all to the British Pacific Steam Navigation Company; but as they all only anchored off Pauillac for less than 24 hours, *i.e.*, just sufficient time for landing and embarking passengers and cargo on their outward or homeward voyages between Liverpool and South American ports, these vessels were not reported to the Consulate at Bordeaux.

Pacific Steam Navigation Company's steamers.

Apart from the British ships touching merely, as mentioned, at Pauillac, it may be observed that the greater proportion of vessels visiting this port in 1893 under the British flag—viz., about 75 per cent.—were employed in the direct trade between Bordeaux and ports of the United Kingdom. Amongst the remaining 25 per cent., 95 British ships arrived here from other ports in France, 45 from the United States of America, 28 from Austria-Hungary, 27 from Portugal, 22 from Russia, &c., whilst 161 British ships cleared for Spanish ports, more particularly for Bilbao, in order to take in their return cargo there for ports in the United Kingdom.

Seaborne trade in British vessels chiefly carried on with United Kingdom. Trade in British vessels between Bordeaux and other countries.

As a ship-owning port Bordeaux still holds the third place amongst French ports (*i.e.*, it ranks next to Havre and Marseilles), but the total number of sea-going ships registered here at the end of the year 1893 amounted only to 110 in number, measuring together 74,295 tons, of which 53 were sailing vessels, having a total tonnage of 41,448 tons, and 37 were steamers of a total tonnage of 32,847 tons. Compared with the figures for 1892, those for last year show a falling-off of 16,000 tons in the tonnage of the sailing vessels, and an increase of 2,500 tons in the tonnage of the steamers, a net total diminution, therefore, of 13,468 tons for the year 1893.

Bordeaux ships in 1893.

Diminution in total tonnage of ships registered at Bordeaux.

It would certainly appear that, so far at least, the new French bounty laws which came into force at the beginning of 1893 have not had the hoped-for effect either of resuscitating the shipbuilding industry or of developing the mercantile navy of this country to a marked degree.

Effects of new French shipping bounty laws.

Apprehensions are on the contrary expressed at Bordeaux and elsewhere in France itself, that the French mercantile navy appears to be not only not increasing in importance like those of other countries, but that its total tonnage is decreasing from year to year; whilst at the same time very few of the small number of newly registered French vessels are built in France, and most of these, in spite of the increase in the already high rate of bounties accorded by the State to French-built vessels, continue to be purchased by French owners in foreign countries.

Opinions at Bordeaux regarding future of French merchant navy. Scarcely any new ships for French merchant navy are built in France.

In so far as regards the encouragement offered to French ship-builders by the new bounty laws, it is still the opinion here that even the increased rates of bounties are insufficient towards enabling French builders to compete with their British rivals; and that under these circumstances it must be regarded as a mistake to have abolished (by the new law) the bounties

Effects of bounty laws upon shipbuilding interests. Increased bounties insufficient for

encouraging
French ship-
building.

Growing
opinion as to
inefficacy of
State assist-
ance, without
more private
initiative
Progress of
harbour works.
Desiderata for
shipping at
Bordeaux.

Proposed
sailors' home.
Provision
made by
French
Merchant
Shipping Law
for sailors'
homes.

Emigration in
1893.

Gradual
decrease in
emigration
during last
4 years.

formerly accorded to French vessels built, or purchased, in foreign countries.

The view appears in fact to be gaining ground in France, that no amount of pecuniary aid on the part of the State will succeed in infusing fresh life into the ship-owning and ship-building interest, unless private initiative and individual effort assist in giving the chief impulse towards their development.

The progress made last year in the harbour works at this port is noticed more particularly in Part IV of this report. I may merely observe here, that amongst the more prominent wants of this port for the interests of shipping should be mentioned the necessity of maintaining a greater depth of water in the river at Bordeaux, and between Pauillac and the sea; the establishment of increased facilities for discharging grain-laden vessels at this port; as well as better arrangements for landing and embarking passengers and goods respectively, from and in vessels which do not ascend the Gironde further than Pauillac.

The project of establishing a sailors' home at Bordeaux, which the authorities have had under their consideration for some time already, has not yet been definitively decided upon. The new French Merchant Shipping Law of 1892 provides, that 4 per cent. of the total amount payable by the State in the shape of shipbuilding and navigation-bounties are to be retained by the Government in order that out of this sum contributions may be accorded to the French local authorities, towards defraying the costs of erecting sailors' homes and other institutions destined for the benefit of French seamen in the ports of this country.

Bordeaux is one of the principal continental ports of emigration for South America; but since the commercial and political troubles broke out there 3 or 4 years ago, there has been an annual considerable falling off in the number of emigrants shipped from hence, in particular to the Argentine Republic.

Whilst in 1889 the total number of emigrants from Bordeaux was 28,905, it only reached 5,410 in the year 1893. The destinations of these latter persons were as follows, viz. :—

Destination.	Number of Emigrants.
Argentine Republic	2,560
Uruguay	860
United States of America	886
Brazil	462
Chile	415
Spanish West Indies	199
Senegal	61
Other countries	28
Total	5,410

Nationality of
emigrants in
1893.

Classified according to their respective nationalities there were

amongst the 5,410 emigrants last year: 2,541 French, 1,543 Spaniards, 470 Turks, 456 Italians, 87 persons born in North and South America, 81 Swiss, 63 Germans, and 91 persons of other nationalities amongst whom there were 11 British subjects.

Trade and Commerce.

It will be seen from the subjoined statistics that, contrary to the expectations of many persons who imagined that the introduction of the new French tariff would give a fresh impulse to the export trade of this country, there was last year an increase, viz., of 470,749 cwts., in the aggregate volume of the imports; and a decrease, viz., of 623,635 cwts., in the total volume of exports at Bordeaux compared with the figures for the preceding year. On the other hand, both imports and exports still show a diminution compared with the figures for the 3 years 1889 to 1891.

Increase in volume of imports, but decrease in volume of exports.

Year.	Total Volume of—		Exports and imports during last 5 years.
	Exports from Bordeaux.	Imports to Bordeaux.	
	Cwts.	Cwts.	
1889	16,038,514	25,313,892	
1890	17,111,366	26,252,712	
1891	16,420,746	27,681,128	
1892	16,398,369	23,836,167	
1893	15,774,734	24,306,916	

The diminution in 1893 in the exports was more especially due to decreased exportations of wines, chemical products, cereals, and most manufactured goods; whilst the increase in the total imports was caused by more extensive importations especially of wood, wool, fish, rice, chemical products, artificial manures.

Cause of decrease in exports and of increase in imports.

It is not possible to obtain at this date a complete review of the trade of Bordeaux in 1893 more particularly with the United Kingdom; but from such trustworthy information as is at present available, it may be gathered that, compared with 1892, there was last year a respective increase and decrease in the importations of the following more important articles from the United Kingdom, viz. :—

British trade with Bordeaux in 1893.

RETURN showing Increase or Decrease of Importations from the
United Kingdom during the Year 1893.

Importations from United Kingdom in 1893. Increase of some, and decrease of others.	INCREASE.		DECREASE.	
	Wool		Flax	
	Cotton		Palm oil	
	Jute		Cotton-seed oil	
	Phormium tenax		Artificial manures	
	Mineral tar		Sulphate of iron	
	Bitumen		Porcelain, clay	
	Sulphur		Bacon and lard	
	Sulphate of copper		Cotton manufactures	
	Phosphates		Linon	"
	Salted meats		Woollen	"
	Crockery		Paper	"
	Jute manufactures		Machinery (except agricultural	
	Agricultural and sewing machines		and sewing machines)	

Exportations
to United
Kingdom in
1893.

As regards the exportations from hence, there was respectively
an increase and decrease in the following more important articles,
viz. :—

RETURN showing Increase or Decrease of Exportations to the
United Kingdom during the Year 1893.

Increase of some and decrease of others.	INCREASE.		DECREASE.	
	Wool		Wines and liqueurs	
	Pitwood		Fresh and preserved fruit and	
	Lamb skins		vegetables	
	Resin		Sugar	
	Rags		Olive oil	
	Zinc ore		Chestnuts	
	Manganese ore		Oil-cake	
	Arachide oils		Copper ore	
	Cream of tartar		Lead ore	
	Talc		Tannin extracts	
	Prunes		Iron manufactures	
	Dried vegetables and vegetable		Jute	"
	flour		Cotton	"
			Paper	"

The two following tables give an account of the total exportations and importations in 1893-92 at Bordeaux to and from all countries of the world, viz. :—

Annex I.—RETURN of the Principal Articles of Export from
Bordeaux during the Years 1893–92.

Articles.	1893.		1892.		Return of chief articles of export from Bordeaux in 1893–92.
	Quantity.	Value.	Quantity.	Value.	
	Cwts.*	£*	Cwts.*	£*	
Wines	1,005,100		1,968,175	4,559,866	
Spirits and liqueurs ..	271,796		282,099	526,183	
Fruit	515,110		441,025	437,337	
Fish	261,820		258,158	575,074	
Tissues of silk	632		469	61,227	
„ wool.. ..	29,142		26,219	694,256	
„ cotton	71,040		37,232	536,759	
„ linen	1,976		2,174	(?)	
Jewellery	242		81	483,136	
Clothing, ready-made ..	10,896		13,231	278,303	
Skins	13,728		10,401	297,458	
Crockery and glass ..	356,496		416,375	239,753	
Cereals and flour ..	74,554		102,932	50,615	
Sugar	46,432		54,997	42,927	
Chemical products ..	202,608		247,393	320,158	
Paper and cardboard ..	58,778		81,823	143,249	
Tools	89,446		131,927	234,272	
Resin, French	135,424		190,148	(?)	
Coffee	7,140		5,227	21,068	
Wood	7,450,408		7,451,069	506,915	
Oils	111,654		102,220	156,581	
Hides	74,628		65,139	275,501	
Gums, exotic	27,486		30,882	93,881	
Seeds	928		5,449	(?)	
Rags	80,222		47,614	49,820	
Wool	58,874		47,961	183,603	
Perfumery	32,820		577	(?)	
Rice	85,890		68,052	50,013	
Meat, salted	15,148		13,475	79,965	
Iron and steel manu- factures	92,148		71,065	41,553	
Cork manufactures ..	9,214		8,776	94,012	
Vegetables, dried ..	36,154		39,463	48,220	
Cheese	7,468		7,662	(?)	
Tobacco, manufactured	1,718		1,424	16,869	
Machinery	19,828		29,478	70,457	
Miscellaneous	3,617,986		4,137,972	3,326,073	
Total	15,774,734	..	16,398,369	13,494,104	

* Calculated at the rate of 2 cwts. = 1 quintal, and 1l. = 25 fr.

**Annex II. --RETURN of the Principal Articles of Import to
Bordeaux during the Years 1893-92.**

Return of
chief articles
of import to
Bordeaux in
1893-92.

Articles.	1893		1892.	
	Quantity.	Value	Quantity	Value
	Cwts.	£	Cwts.	£
Wool	3,158,766	..	1,497,272	426,357
Skins and furs ..	76,324	..	216,352	726,166
Coffee	111,492	..	167,843	434,593
Wool	409,382	..	315,129	1,093,393
Sugar	274,306	..	323,605	217,460
Fish	648,694	..	54,826	76,143
Tobacco	186,372	..	126,926	317,381
Indigo	1,880	..	736	22,984
Cocoa	54,672	..	64,564	217,174
Grease and lard ..	34,156	..	136,192	227,368
Cereals and flour ..	2,376,826	..	2,327,660	1,066,263
Coals	8,752,831	..	9,227,650	368,763
Gum, exotic	78,138	..	78,746	242,427
Archide nuts	489,800	..	512,614	278,466
Spirits and liqueurs ..	262,862	..	308,642	261,366
Cheese	31,442	..	31,616	84,426
Firearms	470	..	700	26,381
Tissues of wool ..	3,608	..	2,663	62,995
" cotton	30,151	..	26,176	366,369
Manures, artificial ..	29,740	..	3,764	..
Rice	406,566	..	256,667	21,773
Copper ore	59,180	..	74,550	182,692
Cotton, raw	2,886	..	3,956	..
Shipbuilding materials ..	89,720	..	83,880	55,796
Pepper	1,692	..	3,551	..
Oils	39,276	..	57,554	18,493
Iron and steel manu- factures	274,666	..	395,478	74,713
Cloth, Indian	16,422	..	12,683	..
Wine	2,406,456	..	3,276,625	1,755,416
Chemical products ..	969,810	..	871,556	379,577
Meat, salted	5,662	..	7,861	25,175
Woods, exotic	80,198	..	51,243	..
Hemp	5,610	..	8,660	..
Vanilla	474	..	497	25,808
Miscellaneous	2,998,260	..	2,848,866	2,556,664
Total	24,306,916	..	23,836,167	12,935,472

I subjoin here a short account of the production and the export and import trade of wine at Bordeaux for the past year; and, following this, some summary observations on the general course of trade last year in the other leading articles of business at this port.

Wine
Production
throughout
France in
1893.
Abundance of
1893 vintage.

Considering the immense importance of viticultural interests for a large part of the French population, and considering more especially also the depression prevailing last year in other branches of agriculture as well as in industry and in commerce, the general results of the vintage in France in 1893 ought to have been a gratifying event for the inhabitants of this country,

and the more so as in many departments such an abundant yield was quite unexpected.

Though considerably smaller in quantity than the yield of 1875, the most prolific on record, and less abundant also than that of some other years previous to 1878, the production of wine throughout France in 1893 exceeded in quantity that of any one of the last 14 years; for it amounted to 1,101,535,940 gallons, and thus was 461,000,000 gallons or nearly 80 per cent. in excess of the yield of 1892.

Wine production in 1893 and in former years. Excess in 1893 over 1892.

The total value of the wine produced last year in France is estimated to have been 50,260,130*l.*, which would therefore give an average price per gallon of 11*d.* (paid to the grower): that is to say, last year's wine was 3½*d.* cheaper than that of 1892, the average price of the latter having been estimated at 1*s.* 2½*d.*

Value in 1893.

In those parts of France, as for instance in the Bordeaux district, in which last year's low-priced wines were not only produced in abundance, but where these large quantities also showed promise of fair quality, the results of the vintage were certainly satisfactory for all concerned; but it appears that these favourable conditions were not attained everywhere. In the south-eastern departments, for instance, the growers, owing to the very inferior quality of the wines produced, have been unable to dispose of their large stocks; and these unfortunate persons are, in their distress, now appealing to the French Government for assistance, and have proposed that in order to facilitate the sale of the wines of those districts a tax should at once be imposed in France on all natural wines containing more than 10·9 degrees (French) of alcoholic strength. It is evident that such a measure, if adopted, would be prejudicial to the interests of wine-growers in the Gironde and other prominent viticultural districts of this country, where many of the wines contain (in average years) a greater degree of alcoholic strength than that abovementioned.

Abundance in some parts of France.

Difficulty of sale in south-eastern France.

Proposed tax on strong wines

Prejudicial effect upon Bordeaux interests.

70 out of the 76 wine-growing departments of France shared in the general increase of production in 1893. Whilst, however, some, as for instance Hérault, Aude, and Garde, only show an increase of 10 per cent., others, that is to say, more especially the 15 departments comprised in the Bordeaux consular district, experienced a much more important augmentation, as will appear from the following table:—

1893 vintage in the various departments.

Yield in
1893-92.

Consular District of Bordeaux.	Annual Yield of Wine.	
	1892.	1893.
	Gallons.*	Gallons.*
Gironde	40,868,710	108,413,734
Charente	1,472,108	4,063,598
Dordogne	3,603,212	6,135,756
Gers	12,350,000	44,062,436
Lot and Garonne	5,980,700	13,367,200
Lot	1,719,960	2,989,514
Landes	5,107,600	17,443,778
Lower Pyrenees	3,368,662	12,378,014
Upper Pyrenees	1,574,320	8,088,690
Ariège	1,091,398	1,895,432
Corrèze	257,796	866,074
Haute-Garonne	6,715,654	18,087,404
Tarn and Garonne	5,060,160	12,459,700
Vienne	8,621,140	11,473,462
Haute-Vienne	9,691	35,794

* Calculated at the rate of 22 gallons = 1 hectolitre.

1893 vintage
in the
Gironde
abundant
and early.
Meteoro-
logical con-
ditions of
season pre-
ceding 1893.

Masses of
buds on vines
in 1893.

Effects of
drought and
heat.

Temperature
of 1893
summer.

Colouring.

Ripening.

Date of
commence-
ment of 1893
vintage.

Last year's vintage in the Gironde, the most important wine-producing department of France, was very remarkable, both as regarded its exceptional abundance, and also the very early date at which the first grapes were gathered. The winter of 1892-93 was, up to the end of January, upon the whole cold and dry. February, however, was mostly wet, and as the next 2 months were unusually and continuously fine and warm, this produced such a powerful effect upon the development of the vines, that already on April 25 their first buds sprouted forth; and before May 15 the vines everywhere were in full flower. Old viticulturists assert that never before have the vines in this district shown such masses of fruit buds, as appeared during the period which then followed, and that never before did the vineyards of the Gironde show such exceptional promise. But a gradual modification of the sanguine expectations entertained by the growers took place after this time, in consequence of the abnormal and continuous heat and drought which prevailed in this, as in most other parts of Europe, during the months of June, July, and August. Though the maximum temperature attained here last summer was not, it is true, equal to that experienced during some few days of 1892, the average monthly temperature of the three summer months of 1893 exceeded that of the same period during any one of the preceding 30 years. Whilst, owing to the extraordinary dryness of the atmosphere, the colouring of the grapes which commenced about the middle of July took a longer time than is usually the case, their ripening was thus greatly hastened by the uninterrupted heat; and the first ripe fruit was actually gathered (in Upper-Médoc) already on August 16. During the subsequent fortnight the entire red wine vintage of this department was in full activity; whilst the

white wine vineyards commenced their vintaging during the first week of September.

Comparing the very early date of the commencement of the 1893 vintage in the Bordeaux district (August 21 is the date now generally adopted here) with that of other years during the present century, it is interesting to note that only once before, viz., in 1822, has the vintage begun as early as the month of August. In most years the commencement has taken place in September, but in 13 out of the last 93 years it has begun only in October, and in 1816 even as late as October 28. It may, perhaps, be observed that, with the exception of the year 1823, all vintages commencing as late as October were poor in quality and quantity.

Comparison of date when 1893 vintage commenced with dates of former years.

Most very late vintages produced poor quality of wine.

Abundance of 1893 vintage in Gironde.

It has already been observed that the long-continued heat and drought of the summer months caused serious apprehensions amongst the wine-growers of the Gironde regarding both the eventual quantity and the quality of their wines. Without entering at present into the question of quality, it will have been gathered from the preceding table that the fears regarding quantity were by no means realized; but that, on the contrary, the abundance of last year's yield by far exceeded that of the preceding year, and, indeed, that of any one of the previous 17 years. This will appear more clearly from the following figures, which show that, with the exception of the years 1874 and 1875 (and these two years are the most prolific on record), the production of the Gironde in 1893 was the most abundant as yet experienced.

Comparative yield of Gironde in 1893 and 1893 and former years.

Year.							Annual Yield of Wine in the Gironde.	Annual yield in Gironde during last 20 years.
							Gallons.	
1874	..	..	..	..	..	..	112,720,146	
1875	..	..	..	..	..	..	116,147,020	
1876	..	..	..	..	..	..	43,142,990	
1877	..	..	..	..	..	..	77,244,068	
1878	..	..	..	..	..	..	48,622,508	
1879	..	..	..	..	..	..	34,485,132	
1880	..	..	..	..	..	..	36,525,170	
1881	..	..	..	..	..	..	28,072,000	
1882	..	..	..	..	..	..	24,588,000	
1883	..	..	..	..	..	..	41,086,100	
1884	..	..	..	..	..	..	29,440,026	
1885	..	..	..	..	..	..	23,673,232	
1886	..	..	..	..	..	..	24,391,070	
1887	..	..	..	..	..	..	25,066,674	
1888	..	..	..	..	..	..	66,000,000	
1889	..	..	..	..	..	..	47,267,352	
1890	..	..	..	..	..	..	35,666,702	
1891	..	..	..	..	..	..	53,858,058	
1892	..	..	..	..	..	..	40,863,710	
1893	..	..	..	..	..	..	108,413,734	

So great and so unexpected was the abundance of the yield

Vintage
stopped at
intervals in
1892

Abundance
in all
growths

Abundance
of "classed"
growths in
Gironde in
1893

of the vineyards in the Gironde last year, that many proprietors were for a time obliged to discontinue gathering the grapes, as there were no more available vats, and vintaging could only be resumed after the first portion had been racked. This abundance, moreover, was not merely confined to the more ordinary descriptions of wines, but it was experienced in a very marked degree also amongst the superior, and particularly amongst the so-called "classed" growths of Médoc, and of other valuable vineyards. It may, perhaps, be of interest to note, by reference to the two following tables, which contain an enumeration of most of these "classed" growths, that the yield of the year 1893 was not only more than twice as abundant (in all instances) as in 1892, but that, with only a few exceptions, last year's yield exceeded that of the most prolific year on record in this district, viz., 1875.

Classed Red Wines of the Médoc District.	Annual Yield.			Comparative yield of "classé growths" of Médoc in 1893, 1892, and in 1875.
	1875.	1892	1893.	
	Hogsheads.	Hogsheads.	Hogsheads.	
First growths—				
Château Lafite	984	324	1,000	
" Margaux	920	826	1,608	
" Latour	520	380	668	
" Haut-Brion	..	140	640	
Second growths—				
Château Mouton	600	156	590	
" Rauzan Sègle	420	208	420	
" " Gassies	387	124	288	
" Léoville Lascazes ..	808	480	920	
" " Poyferé	600	280	720	
" " Barton	580	256	656	
" Durfort	340	120	380	
" Gr. Larose	1,028	378	1,560	
" Branc Cantenac	620	400	734	
" Pichon	632	388	984	
" Cos d'Estournel	1,000	760	1,080	
" Montrose	1,000	880	1,360	
Third growths—				
Château Kirwan	292	350	640	
" Issan	560	342	720	
" Lagrange	1,080	280	1,200	
" Langoa	972	280	1,080	
" Giscours	512	268	596	
" Palmer	992	410	872	
" Lalagune	380	140	400	
" Desmirail	300	140	300	
" Calon	872	520	840	
Fourth growths—				
Château St. Pierre Luctkens ..	132	60	160	
" " Bontemps	148	120	324	
" Talbot d'Aux	500	212	620	
" Duluc	512	212	720	
" Duhart Milon	560	232	780	
" Carnet	560	208	468	
" Lafon Rochet	124	88	223	
" Beycheville	900	420	948	
" Le Prieuré	172	124	248	
Fifth growths—				
Château Pontet-Canet	1,000	600	1,320	
" Batailley	680	200	644	
" Gd. Puy-Lacoste	760	440	1,000	
" Ducasse	500	248	640	
" Vasquez Moussas	684	132	580	
" Dauzac	680	480	980	
" Armailhac	860	460	1,500	
" Bruno Devès	250	72	360	
" Cantemerle	772	240	812	

Yield in 1893 of other red wines, of Médoc and the rest of the Gironde.

The yield in the vineyards of the Gironde growing so-called "bourgeois supérieurs," "bourgeois," "paysans" and "artisans" wines was, on an average, more than twice as plentiful as that of the year 1892. Amongst the white wines of this district the difference was not so great, as will appear from a comparison of the yields of some of "first growths" of white wines (inferior sorts showing, upon the whole, about the same difference in their annual yield).

Comparative yield in 1893, 1892, and in 1875, of "classified" white wines.

Classed White Wines of the Gironde.		Annual Yield.		
		1875	1892.	1893.
		Hogsheads.	Hogsheads.	Hogsheads.
First growths—				
Château Yquem	.. ..	688	600	900
" Vigneau	.. ..	280	120	120
" Sudirant	.. ..	320	298	600
" Contet..	.. ..	174	60	280
" Climens	.. ..	84	48	264
" Guiraud	.. ..	292	180	304
" Rieussec	.. ..	200	260	520

Growers in Gironde satisfied last year.

Total yield of Gironde in 1893.

It will thus have been rendered evident that in so far, at all events, as regarded quantity, the growers, both of the superior and of the cheaper class of wines, had no cause to feel dissatisfied last year in the Bordeaux district. The fact, indeed, that the Gironde alone produced in 1893 an amount of wine representing the contents of more than 660,000,000 bottles, ought to be satisfactory to all persons interested in the production of Bordeaux wines.

Quality of 1893 wines cannot yet be ascertained.

The important question, however, as yet remains to a certain extent unsolved, whether the '93 wines grown in this district will turn out equally successful in point of quality as they have done in point of quantity; nor will it be possible to give a definite answer to this question until most of these wines shall have reached a further stage in their development. It has hitherto in this part of France been considered an accepted rule that, in order to produce a fair quality of wine, the sum total of degrees of heat during the annual period of growth of the grapes, viz., from March 1 to September 15, ought not to exceed 4,500 degrees (centigrade), and that the total annual rainfall ought not to be less than 750 millimetres. Last year, however, the sum total of the degrees of heat during the period mentioned was no less than 4,962 degrees (centigrade), whilst the total rainfall during the 12 months 1892-93 did not exceed 618 millimetres; and these abnormal meteorological conditions have accordingly caused some persons to maintain that the quality of last year's wines will probably turn out a failure.

Conditions thought necessary hitherto in order to produce good wine. Conditions of last summer were abnormal.

Majority of opinions at Bordeaux are

But whilst, as already observed, a definite opinion cannot be pronounced for some little time yet regarding the future success

of the 1893 wines of the Gironde, there are, according to the view of many competent authorities, certain indications which go far towards rendering it most probable that the majority of these wines will turn out fairly well; and these favourable predictions are made regarding both the superior and the inferior growths. In so far as regards their present qualities most persons here appear to agree that, with the exception of some of the "Palus" wines, last year's wines of this district contain a sufficiently high percentage of natural spirit, and that they have a good colour and a pleasant "bouquet."

favourable as regards future quality of 1893 wines.

Present qualities of 1893 Gironde wines.

It may be considered promising for the success of the 1893 wines that hitherto all exceptionally abundant vintages, such as 1874, 1875, 1877, 1878, and 1888, have also turned out well in point of quality.

Abundant vintages usually good in quality.

I have already observed that, with the exception of the years 1874 and 1875, last year's vintage in the Gironde was the most prolific on record. But this fact will perhaps appear yet more noteworthy when it is taken into consideration that the acreage of vineyards under cultivation in 1893 was 77,500 acres smaller than that existing in the two other years first-mentioned, for whilst in 1874 and 1875 the total acreage was 427,500 acres, it was last year only 350,000 acres. The average yield of wine per acre in the Gironde in 1893 therefore exceeded that of the two years mentioned, or, in other words, the average yield per acre was greater last year than in any former year.

Acreage of vineyards in 1893 smaller than in 1874 and 1875.

Average yield per acre greater.

The outfall of 77,500 acres in the acreage of vineyards in this department has, I need scarcely remark, been caused by the ravages of the phylloxera, which have indeed extended over more than 100,000 acres in the Gironde alone.

Average production per acre in 1893 was the greatest on record.

The annual extent of land cultivated with vines fluctuates somewhat both in this district and in most other parts of France, for it depends upon the annual extent of fresh vine plantations, and also upon the extent of land rendered more or less unproductive each year by the phylloxera. In 1893, for instance, the annual increase in the total acreage of vineyards throughout France only amounted to 26,770 acres, and was thus considerably less important than the increase for the preceding year. The total acreage of vineyards throughout France at the end of last year was still about 1,500,000 acres less than it was 20 years ago, *i.e.*, before the appearance of the phylloxera. These figures may offer some idea of the enormous losses caused to this country by the noxious worm in question, both through the actual destruction and deterioration of countless vines, through the outfall in wages and the diminished demand for workers, as also through the necessity of importing foreign wines, and by the manufacture of artificial wines in order to make up for the deficiency which took place in former years in the home production. To these costs must be added those of the fresh plantations which have already been made, and of those which are still required on more than 1,500,000 acres of devastated vineyards.

Diminution of acreage in Gironde caused by phylloxera.

Annual increase of vineyards throughout France fluctuates.

Rate of increase in 1893.

Present acreage compared with 20 years ago.

Losses by phylloxera in France.

Decreased
acreage in 29
departments.

Increased
acreage in
Gironde and
others.
Fresh
plantations in
Gironde.

Effect of
newly planted
vines.

Effect of new
Franco-
American
vines.

Wine from
direct-
producing
American
vines more
plentiful, but
inferior.

Propagation
of phylloxera
by dry
weather of
1893.

Insufficient
precautions
in Gironde.

Appre-
hensions as
to spread
during next
2 years.

Though the rate of annual increase in the total acreage of the vineyards in France was comparatively slight last year, owing to the extent of vine-growing land having, in fact, diminished in 29 departments, the other wine-producing departments, and amongst these the Gironde, experienced a certain increase in the acreage of their vineyards in 1893 compared with the figures for the preceding year. In the Gironde more particularly this increase is stated to have been 13,723 acres.

The total extent of fresh vine-plantations made in this department since the phylloxera first commenced its destructive course is estimated to have thus now reached about 85,000 to 90,000 acres. It would be interesting to know exactly all the localities where these fresh plantations have been made, in order to be able to make a minute comparison between the qualities of the wines produced there formerly with those of the wines now produced. For there appears to be still a good deal of controversy regarding the question, as to whether and to what extent the qualities of the wines made at present from the various species of newly planted Franco-American vines are inferior to those of the wines made in the same vineyards before they had to be uprooted and recultivated. Many persons are of the opinion that, whilst these fresh plantations of Franco-American vines will yield and have already yielded larger quantities of wine, the fine qualities attained in certain exceptional years of former times will never again be obtained. In so far as regards the vineyards recultivated with direct producing American vines (of which, however, only a very few exist in this district) there can be no doubt that these are more productive than the old French plants, but that the quality of the wine is inferior.

It appears to be thought by some experienced viticulturists that, notwithstanding the prolific vintage of this district in 1893, considerable impulse was given last year to the propagation of the phylloxera amongst the vineyards of the Gironde by the unusually dry weather which prevailed here, indeed, with short intermissions, since the middle of 1892. It is thought, moreover, that many proprietors, judging too hastily from the flourishing appearance of their vines during the last 3 or 4 years (which was due particularly to the effects of the preceding comparatively moist seasons), neglected in 1893 to apply as extensively as in previous years the more efficacious remedies used towards combating the attacks of the phylloxera. The fear has accordingly been expressed that during the present and next year many vineyards will be found infested by the noxious worm in a more serious degree than hitherto experienced, and that possibly 40,000 to 50,000 acres of vines will have to be uprooted during the next 2 or 3 years. It must in the interest of the wine-growers (who have assuredly been already sorely tried in many ways during recent times) be hoped that these prognostications will not turn out to be correct; for if they should come true, this would entail the utter ruin of many proprietors, as only a few would have

means for replanting large tracts of devastated land, especially if called upon to do so quite suddenly.

The discovery of a sure remedy not merely for warding-off, but for destroying the phylloxera and for ridding the vineyards of this terrible scourge has not yet been made; and up to the present the prize of 12,000*l.* offered by the French Government for this discovery has accordingly not yet been awarded to anybody. The chief and most efficacious method of combating the phylloxera which has hitherto been applied, wherever the locality permits, is the temporary flooding of the vineyards with water, and where this is not practicable the roots are treated with sulphuretted carbon.

No certain remedy against phylloxera yet discovered, where flooding of vineyards not practicable. Remedies against phylloxera.

Whilst the drought and the heat of last summer were favourable for the propagation of the phylloxera, they were, fortunately for the vineyard proprietors of this district, decidedly unfavourable for the development of the various cryptogamic diseases which in some years have done almost more harm than the noxious worm first-mentioned. Mildew appeared only in a very slight extent, though it is said to have done much damage in other parts of this country, not to mention Spain and Portugal. Antrachnosis was also but very little met with; and Blackrot was not seen here at all.

Cryptogamic diseases rare.

Mildew.

Antrachnosis.

Blackrot.

Cochylis has disappeared.

The Cochylis worm which made such havoc among the grapes in the Gironde in 1890, 1891, and 1892 (as reported by me at the time) has altogether disappeared, in consequence of the complete destruction of the eggs of this insect by the scorching hot wind which prevailed here on August 16, 1892. A fresh enemy of the vine is said, however, now to be threatening to take the place of the Cochylis, viz., the *Eudemis botrana* (the "grape-twister"); but during the past year the reports of damage done to the grapes were not, it appears, of a very serious character; and it may be hoped that the fears regarding the destructive propensities of this new scourge of the vineyards have been exaggerated.

Endemis
Botrana

With regard to the purchase of the 1893 wines of the Gironde for the Bordeaux market, it may be said that rarely before has such a large proportion of the produce of any one year (and that an exceptionally abundant yield) passed so quickly out of the hands of the growers into those of the Bordeaux merchants. When it first became known here that some few sales of the 1893 wines had been made by the proprietors, and that the prices asked were unusually low, there was a regular rush, more especially upon the vineyards of Médoc and of St. Emilion, and other valuable districts; and in a few weeks about three-fifths of these wines, including all the higher growths, were bought up at Bordeaux. The prices paid were, as mentioned, exceptionally low, lower perhaps than those paid in any year since 1870; but the quantities sold being exceptionally large, the vineyard-owners must have gained a fair profit. The wines having now passed into the hands of the trade, the prices have of course experienced a rise; but they are still comparatively

Rapid sales of 1893 wines of Gironde last autumn to Bordeaux merchants.

Exceptionally low prices asked by growers for 1893 wines.

so low that the purchase of last year's wines must be regarded as a fair investment, even if their quality should not turn out anything extraordinary.

Effects of abundant vintage of 1893 upon export trade cannot be apparent until returns for 1894 are published. Wine - Export trade of Bordeaux in 1893. Diminution in total shipments of wine from Bordeaux in 1893. Comparative review of exportations of wine in 1893-92 to various countries.

It is perhaps hardly necessary for me to observe that none, or hardly any of the wines made in this district last year have as yet been shipped from Bordeaux, and that therefore the effects of the unusually abundant vintage upon the export trade cannot appear in the following return of the wine exportations in 1893. The subjoined table will, on the contrary, show that the aggregate shipments of wine made last year to the various wine-consuming countries of the world experienced a further diminution, which, compared with the shipments in 1892, amounted to no less than 1,049,014 gallons; for whilst in the year last named the total exportations (in wood and in bottle) reached 18,332,952 gallons, the total exportations in 1893 amounted to only 17,283,938 gallons.

Countries to which Exported.	Shipments of Wines in Wood.		Shipments of Wines in Bottle.	
	1892.	1893.	1892.	1893.
	Gallons.*	Gallons.*	Gallons.*	Gallons.*
United Kingdom ..	3,430,812	3,340,216	626,494	547,514
Germany	3,552,230	3,380,542	59,158	45,430
Belgium	1,620,256	1,595,022	48,092	38,146
Netherlands ..	1,443,024	1,380,768	53,602	39,732
Sweden and Norway ..	139,398	86,790	22,704	18,678
Denmark	403,204	326,688	8,680	4,928
Russia	138,578	211,530	11,066	16,390
Spain	16,808	6,204	9,460	3,102
Canadian Dominion ..	32,340	27,742	18,546	21,032
United States of America ..	287,872	182,952	186,510	131,054
Argentine Republic ..	3,211,120	2,548,684	44,440	37,334
Uruguay	798,128	409,926	6,006	8,102
Brazil	239,910	235,582	47,212	34,518
Mexico	186,164	44,022	55,704	6,836
British India	1,012	200	660	..
Mauritius	170,688	165,396	24,618	1,100
Senegal (French) ..	275,022	279,092	33,704	38,698
Other countries ..	999,328	947,650	190,906	126,610
Total shipments ..	16,926,294	15,118,906	1,406,658	1,165,032
Estimated value £	4,246,966	(1)	689,390	(1)

* Calculated at the rate of 22 gallons equal to 1 hectolitre.

Falling-off in wine exportation to all countries in 1893, except to Russia and Senegal.

With the exception of Russia and the French colony of Senegal, all of the prominent claret-consuming countries of the world mentioned in the preceding table show a more or less considerable falling off last year in their demand for Bordeaux wines. This diminution, moreover, took place both in the inferior class of wines and in the more expensive kinds. The countries which consume the largest share of the class first mentioned, viz.,

the Argentine Republic and Uruguay, show a falling-off respectively of 662,476 gallons, and of 388,202 gallons, compared with the shipments during 1892. The exportations of wine more especially to the Argentine Republic have, in fact, experienced an annual marked diminution since the year 1889, in which year no less than 8,270,724 gallons were shipped to Buenos Ayres, whilst last year the total amount was only 2,548,634 gallons. To a great degree this falling-off has, doubtless, been due to the continued political and commercial troubles in that country; but a further important cause has been that, in consequence of the change in the French import duties, Italian and Spanish wines have been shipped direct from Italy and Spain to the River Plate, instead of being sent via Bordeaux, as used to be the case in former years. The other non-European countries which are comparatively the most important consumers of Bordeaux wines, both of a higher and inferior class, are the United States of America, Brazil, Mexico, Mauritius, and the French colony of Senegal. The exportations to the United States were considerably more extensive previous to the last decade, but, in consequence of the higher customs duties and the protection of home-grown wines (a large proportion of which are, however, passed off as French) in that country, they have largely decreased during the last 10 years. Strenuous efforts are being made both by the French Government and by delegates sent by the Bordeaux wine merchants, to obtain an abatement of the wine import duties in the United States now that a revision of the tariff is taking place, and it is hoped here that such a measure will give a great impulse to the exportation more especially of the class of wines used for daily consumption, which at present are (in consequence of the high duties) too expensive as a daily beverage for the large majority of the public in America.

Large diminution in wine shipments to Argentine Republic and to Uruguay.

Diminution in exportations to United States, Brazil, &c. Wine export from Bordeaux to United States.

The export trade to Brazil has not, it would seem from the preceding figures, suffered so much during the past year from the troubled political condition of affairs in that country as would have been expected.

Wine export to Brazil.

Shipments both of wines in cask and in bottle to Canada experienced a slight falling-off last year, and the export trade from hence continues to be unfavourably affected by the high Canadian duties on French wines, and by the consequent successful competition of Californian wines of a cheap class, which are imported into the Dominion in large quantities, and sold there, as a rule, as French wines.

Wine export to Canada.

British India appears to be consuming less and less Bordeaux wine every year, as will be seen from the above table, though, of course, the figures given there refer merely to the shipments made to India direct from this port, and do not comprise the wines sent there in transit through British or other ports. Indian newspapers ascribe the falling-off in the consumption of claret to the very inferior quality of wines imported of late years into India from Bordeaux. Apart from the question as to whether

Wine export to British India.

Indian opinion as to cause of decreased consumption of claret in India.

the greater proportion of these clarets were actually shipped from this port, there would seem to be no sufficient reason why claret drinkers in India should not be able, as well as consumers in other countries, to obtain good genuine Bordeaux wines, which assuredly are purchasable here in sufficiently large quantities.

Sound claret
easily
obtainable
now at
Bordeaux.

Wine export
trade to
European
countries.

Increase of
wine
exportations
to Russia.

Diminution of
wine ship-
ments to the
United
Kingdom in
1883.

Expectations
of increase
not yet
realised.

Causes of
diminution
more
perceptible
since 1882.

With regard to the wine export trade to European countries, it has already been observed that the only country to which the shipments show an increase was Russia, and it may be added that this increase was due to the considerable reduction in the Russian import duties on French wines which came into force last year. The shipments of wines from this port to the United Kingdom experienced last year a total diminution of 169,576 gallons, that is to say, of 90,596 gallons of wines in casks, and of 78,980 gallons of bottled wines, and the expectations held here (and adverted to in my last annual report), viz., that the series of favourable vintages during the previous 5 years in this district would gradually give a greater impulse to the consumption and importation of Bordeaux wines in Great Britain, were not yet realised. The abundant, low-priced, and, upon the whole, promising wines made here last year have now raised fresh hopes at Bordeaux regarding an extension of the export trade to the United Kingdom, but it remains as yet to be seen whether this will be the case. Up to the present the orders received from British markets for '93 wines have been very limited. It is, as I have remarked on a former occasion, difficult to say precisely what may have been the cause of the diminution which first set in about 12 years ago in the demand for Bordeaux wines in the United Kingdom; that is to say, whether it has been chiefly the largely-increased consumption of sparkling wines and of spirits in the United Kingdom during the last decade, or whether it has been rather the rise in the price, and the simultaneous falling-off in the average quality of most of the Bordeaux wines produced during the period from 1882-86. The following figures show that the decrease which has taken place in the wine shipments from hence to British ports since the year first-mentioned has been considerable, viz.:—

Year.						Total Shipments to the United Kingdom.	Wine exportations to United Kingdom during last 18 years.
						Gallons.	
1881..	..	..	..	..	..	5,799,894	
1882..	..	..	..	..	..	4,910,796	
1883..	..	..	..	..	..	4,731,078	
1884..	..	..	..	..	..	4,602,340	
1885..	..	..	..	..	..	4,913,942	
1886..	..	..	..	..	..	4,660,112	
1887..	..	..	..	..	..	4,164,854	
1888..	..	..	..	..	..	3,817,000	
1889..	..	..	..	..	..	4,142,072	
1890..	..	..	..	..	..	4,669,578	
1891..	..	..	..	..	..	4,120,446	
1892..	..	..	..	..	..	4,057,306	
1893..	..	..	..	..	..	3,887,730	

The comparatively important share, however, taken again last year by Bordeaux wines amongst the aggregate quantity of French and other foreign wines imported to the United Kingdom, which amounted to 8,923,471 gallons, may be gathered from the fact that of this total quantity 3,887,730 gallons were received exclusively from Bordeaux, whilst only 1,869,738 gallons comprising chiefly sparkling and other white French wines, were imported from other parts of France. The aggregate wine importations to the United Kingdom from all parts of France (which thus reached 5,757,468 gallons) experienced a falling off of 43,099 gallons compared with the year 1892 in which the aggregate importation had been 5,790,567 gallons. The aggregate importations however from all other foreign countries which in 1892 had reached 5,768,253 gallons, was only 3,176,003 gallons in 1893.

It is thus rendered evident that the diminution which took place last year in the shipments of wine from Bordeaux to the United Kingdom was not due to any special cause affecting Bordeaux wines only, but that the same was owing to general causes affecting all wine importations, viz., to the decline in the purchasing power of the British wine consumer. But, whilst the chief cause of the diminution in the wine exportations from this port during 1893 may thus be considered to have been the generally depressed state of business in the United Kingdom, the falling off which set in in the consumption of Bordeaux wines in Great Britain with the year 1882 and has continued since that time, must, as already observed, be chiefly ascribed to the unsatisfactory results of the vintages which took place in this district from 1882 to 1886. The unfavourable impression made upon the British wine-market by those results has apparently not yet even been fully dispelled, in spite of the long series of successful vintages which commenced with the year 1887 and has lasted up to the present. In view, however, of the favourable vintages of the

Hopes at
Bordeaux for
increased
demand in
United
Kingdom.
Good wines
now
obtainable at
Bordeaux.

period last mentioned, and in view of the exceptionally abundant and promising vintage of 1893, it is greatly hoped here, that a largely increased demand for Bordeaux wines will now again take place in the United Kingdom.

It must certainly at present be admitted that there is no difficulty in obtaining good, sound, and comparatively low priced wines, both of higher and inferior growths, at Bordeaux. Consumers who may prefer waiting some time yet before purchasing 1893 wines of this district (which may be advisable), will find a plentiful stock here of preceding vintages. Amongst these the wines of 1892, which were already remarkable for their comparative ripeness soon after the vintage, are now rapidly approaching maturity, in consequence of the effects of last year's heat; and these are of fair quality. The light, smooth wines of 1891 are considered to be a good investment now, on account of their comparatively low price. Those of 1890 are of rich colour, fruity, and of fine flavour; they are developing satisfactorily, and are regarded as particularly well suited to the English taste. Both 1889 and 1888 wines (the former have now mostly been bottled) comprise many excellent wines, and many 1888 wines are now in great demand. Those of 1887, fine coloured, sound, good wines, will not be drinkable for some time yet, excepting the lighter growths, owing to their great body. With regard to the wines of the five preceding vintages of this district (viz., 1882 to 1886) these were, as already mentioned above, an almost entire failure. Both 1880 and 1881 produced many good wines, and these are now in good condition for drinking. Of older vintages it is hardly necessary for me to repeat, that those of 1878, and the small remaining stock of 1874, not to mention the very limited quantity of 1875, are being rapidly cleared off; the same may be said of the fine full bodied wines of 1870.

Wine import
trade to
Bordeaux.

The total importations of foreign-grown wines to Bordeaux during the year 1893 experienced a further considerable diminution compared with the figures of the two preceding years, as is shown by the following table:—

Importations
of foreign
wines to
Bordeaux
during last
3 years.

Countries whence Imported.	Importations of Foreign Wines to Bordeaux		
	1891.	1892.	1893.
	Gallons.	Gallons.	Gallons.
Spain	33,871,288	18,880,002	16,274,744
Algeria	9,069,541	9,000,568	4,139,000
Italy	19,294	1,212,76	600,570
Portugal	418,650	600,101	702,132
Other countries	2,389,925	1,087,700	1,521,288
Total	45,769,508	30,608,890	24,709,188

Reasons of
diminution in

These foreign wines being chiefly used in France for blending

with common French wines of slight alcoholic strength (after which process they are either consumed in this country itself, or re-exported more especially to South America in the form of so-called "vins de Cargaison"), the extent to which they are annually imported here naturally depends upon the quantity and relative alcoholic strength of the wine produced in such year in France itself, and upon the demand for these blended wines for home and foreign consumption. Thus the series of favourable vintages in France during the last six years, together with the considerable falling-off in the consumption of French wines in the Argentine Republic and in Uruguay (and to some extent also the increase in the French import duties on foreign wines), have caused a gradual and important diminution in the importations of Spanish, Portuguese, Italian, and other foreign grown wines to Bordeaux and to other French ports of late years.

Last year's crop of French plums is estimated at over 600,000 cwts., and was, indeed, the largest ever brought to market in this country. In consequence of the very warm summer and the continuous drought, this fruit ripened prematurely and did not thoroughly develop in size, but it contained an unusual proportion of saccharine matter, and was of excellent keeping quality. Prices were the lowest that have ever been known in the plum trade here, the four sizes 70/5, 80/5, 90/5, and 100/5 fruit to the French lb. averaging only 18s. per cwt., against 17. 16s. during the previous season. To a great degree, however, these low prices were due to the financial crisis in the United States of America, which prevented the laying down of the European Bank Credits, necessary for the purchase of this article. The American financial depression likewise reduced the quotations for plums grown in California, where the yield last year was also large; and though, as the crisis abated, a certain quantity of French plums was sold to the United States, the same was not large enough to cause a material rise in prices at Bordeaux. The year closed with about 100,000 cwts. of plums unsold, and most of these have been specially prepared, and are held by merchants here who look to the possibility of a small crop next autumn.

Plums, course
of trade in
1893.

Walnuts, like all other fruit, ripened early in 1893. This circumstance was specially important for an article which, above all, must be delivered in time for the Christmas trade. The nuts were, however, small and of poor appearance, having evidently suffered from the drought. At the same time they were perfectly dry a fortnight earlier than usual, and Bordeaux shippers were thus able to do a satisfactory business. Prices ruled lower than in 1892. The exportations to Germany were rather larger, those to America much smaller, than in the preceding years.

Walnuts.

The catch of sardines, which depends so greatly upon fine weather, was a success on the French coasts, the fishing continuing off Northern Brittany into December. Owing to the general depression of trade and to the accumulation of stocks

Sardines

abroad, export business in this article has been languishing of late, and prices are comparatively low. Common qualities of Portuguese packing have been, and still are, almost unsaleable at 17s. per 100 tins; this latter fact being, to a great degree, owing to the Australian and South American markets (the chief foreign outlets for Portuguese sardines) not having yet recovered their elasticity. Under such conditions it is not surprising to hear that many Portuguese packing-houses have lately been closed.

Gums. Last year's importations of Senegambian gums amounted to 39,159 bags, or about 640,000 cwt., as against 638,000 cwt. in the previous year. This difference was slight, but prices have continued to decline since 1892, and at the end of last year they stood 15 to 20 per cent. below those 12 months ago. The gum market is still very quiet, chiefly because (as mentioned in my last report) there are now such large quantities of gums at low prices collected in Arabia, Egypt, and other Eastern countries.

Rice. A considerable increase took place in 1893 in the importations of rice to this port, viz., 17,500 tons of paddy, as against 10,000 tons in 1892. Arrivals of Moulmein rice were, however, about 500 tons less than in the previous year. A brisk demand and firm prices continued here until the end of 1893.

Coffee. The stock of coffee remaining on hand at the end of December was 24,950 bags, against 27,037 bags at the close of the preceding year. Prices fluctuated only slightly and generally ruled firm. The revolution in Brazil had, however, a prejudicial effect upon the coffee market here, as elsewhere, owing to the fear that regular shipments might cease from that very important coffee-growing country. It is, of course, hoped that there will soon be an end of the Brazilian troubles; and that favourable reports of the crops in Venezuela, Central America, and in Java will contribute towards making up the growing deficiency in European stocks, and cause a fall in prices.

Cocoa. The stocks of cocoa were very limited at the commencement of 1893 in all European markets, and during the first five months prices rose from 10 to 20 per cent. In June, however, it was to be seen clearly that the reduced crops in Trinidad (the chief cause of the high quotations) would be fully compensated by increased shipments from Guayaquil. The situation of affairs became much easier, and at the end of last year prices stood where they had been before the rise. A further fall may be expected in quotations, as recent news regarding the new crops are favourable.

Sugar. The amount, estimated as the probable production of French beetroot-sugar for 1893-4 was a good deal reduced by the long drought of the last summer, and only reached 565,000 tons—that is to say, 35,000 tons less than expected. These figures are only approximative, as the entire harvest has not yet terminated. The deficit in the French crops is, however, counterbalanced by the surplus of other countries, in particular of Germany, Austria, and Russia, which, it is stated, amounts, for all Europe, to about

380,000 tons more than the crop of 1892-3. The sowing of the next harvest in France will take place under unfavourable auspices in consequence of the indifferent quality of the seed, and the acreage sown will not exceed that of last year in this country.

The importations of Montevideo dry hides amounted in 1893 Hides. to 55,000, whilst those from Buenos Ayres amounted to 35,000 dry and 29,000 salted hides. At the beginning of last year business here was animated, but it later became quiet, as the long drought obliged farmers in France to slaughter a portion of their cattle, and tanners preferred of course to buy the fresh hides, especially as they were to be had cheap. Thus the foreign stock accumulated and prices fell, increased importations being moreover caused by the abstention of North American buyers at the River Plate.

Only 36,000 bales of sheepskins were imported here from the Sheepskins (River Plate). River Plate in 1893, against 49,000 bales in 1892, a diminution which may be due to the desire of owners in that country to renew their flocks which had suffered so severely from epidemic diseases in the year last mentioned. No important change has taken place in this article here; five public sales (against three in 1892) were held during 1893, and, in consequence, private transactions were very limited. The fall in the price of wool during the past year naturally diminished the value of the pelts, and at the end of December prices accordingly stood lower than 12 months before.

The deficit in the importations from the River Plate were Sheepskins (Australian). in a great measure made up by the increased arrivals from Australia, which amounted to 16,000 bales in 1893, against 10,000 bales in 1892, and 5,000 bales in 1891. These skins were imported here almost exclusively during the first 7 months of the year; business subsequently was arrested by the fact that the purchases made in April and May in Australia were at prices which left no margin of profit for importers. Australian sheepskins have now definitively taken up an important place here in the general consumption, and are in general much sought after, owing to their qualities. The sales here amounted last year to 5,100 bales, against 3,700 bales in 1892.

Though 2,500 bales of Cape sheepskins were imported here last Sheepskins (Cape of Good Hope and others). year in consequence of direct orders given by the fellmongers in the south of France (against 500 bales in 1892), little remained here for local consumption; and the fall in prices was so great that orders for future delivery were cancelled. A few lots, of very limited importance, of Hungarian, Spanish, and Peruvian pelts were sold here during 1893.

No amelioration has taken place in the situation of the cork Cork. business since my last annual report. Owing to the troubled political state of South America and the high rate of exchange ruling there, exports thither have greatly decreased. As already observed, the high duties now imposed in many countries on cork manufactures have done a good deal of harm to the cork industry.

here, as the unmanufactured cork-wood is admitted duty free in those countries. Spain and Portugal maintain a keen competition in this article with France, the former possessing large quantities of the raw material, whereas France is compelled to draw a large proportion from them, as Algeria and Tunis do not furnish sufficient supplies for French wants; in fact, the cork trade of Bordeaux is gradually becoming reduced to a purely local industry.

Resin and
turpentine.

The resin production of this district in 1893 was less extensive than that of an average year, the drought having prevented the development of this product. Besides this circumstance, numerous forest fires (the result of the great heat or of accidents) which devastated large tracts of the Landes district, reduced last year's yield still more. The large stock, however, of 1892 prevented a rise in the price of turpentine last year, and the same remained at average quotations; but exportations show a falling off compared with previous years, and the extent of home consumption was stationary. Business in resins, however, and particularly in the finer sorts (which latter were very scarce, owing to the great heat having darkened a large proportion of the crop) was of considerable importance in 1893, prices ruling about 10 per cent. higher than in former years. The ordinary kinds of resin were, as usual, consumed in France itself. Owing to the abovementioned damage done by forest fires, the resin harvest of 1894 will doubtless also be a comparatively small one.

Coals.

During the past year 451,000 tons of British coal were imported here; of which 68,000 tons are stated to have been ordered by the Orleans and Southern Railway Companies, thus leaving 383,000 tons for private consumption. The latter figure shows a falling off of 35,000 tons compared with the same figure for 1892, of 11,000 tons compared with 1891, and of 42,000 tons compared with 1890. These diminutions have been caused chiefly by the strikes in the United Kingdom of late years, which from time to time increase the price of British coal and at times even stop the supply of the same altogether, thus affording no security and stability to consumers in this, and other foreign countries. In consequence an increasing number of consumers here now try to use French coal, certain qualities of which are cheaper than British and are fairly satisfactory.

Production of
French coal
mines.

Although the French coal mines have the sale of their production assured, and in principle, cannot put out more annually than they do at present, it is not improbable that, in view of increasing demands for French coal, the annual output will, in future, after all be augmented. Should this actually take place, it will most certainly be the fault of the British coal industry; for manufacturing establishments, and even many private households in this country, do not care to run the risk of having to pay a different, i.e., a higher, price for their coals each time they give an order. Since July last the strikes in the Midlands and also in Scotland have raised the coal prices here and everywhere else, and so long as the present prices prevail and fresh dis-

turbances in the British coal mining industry appear likely, it is useless to hope for an increase in the consumption of British coal in the Bordeaux district. It is, on the contrary, rather to be feared that with such prospects, and with the prevailing protectionist tendencies in France, British coal will be gradually driven out of this market by its French rival. I need, perhaps, hardly add that such an eventuality would not only be very prejudicial to the interests of the British coal trade and industry, but also to those of our shipowners who now send a considerable number of coal-laden vessels annually to this port.

Unfavourable prospects of import trade in British coal at Bordeaux.

The position of the bacon and lard trade has not materially changed here since my last annual report, importations being almost impracticable on account of the high duties. Since the coming in force of the new French tariff, manufactories have been established, especially at Paris and Marseilles, for making a cheap lard to replace to some extent the American article which is no longer in the market; and it is stated that considerable success has attended the introduction of the French product. The rearing and breeding of pigs in this country appears also to be carried on on an increasing scale at present, and prices were sufficiently remunerative in 1893 for the farmer, to encourage them to develop this branch of agricultural industry in future. On the other hand it is, however, thought not improbable that, on account of a relative over-production of cheap French lard in 1894, prices will fall in the course of the next 12 months.

Bacon and lard.

Prices of wheat which stood rather low at the commencement of last year, recovered slightly in February, in consequence of unfavourable reports from America. A reaction set in shortly afterwards, and until May the market remained in a very irregular condition. At this latter date apprehensions began to be experienced in France regarding the home crop, owing to the continued drought; but the latter, though rather limited, turned out better after all than expected. As soon as this result had been realised prices declined, it being also found that the stocks still on hand of the preceding year were considerable, and thus under the further influence of unfavourable reports from America where the markets were disorganised and were suffering under the pressure of the monetary crisis, quotations here declined lower and lower. The consequence of these various influences was that business was very fluctuating and unsatisfactory in France during the last part of the year, and the unfavourable prospects of the farmers caused the question of increasing the import duties on foreign corn to be raised before the French Chambers. The probability of such a measure being passed caused prices to rule rather firmer, without, however, increasing values to any material extent.

Wheat.

The home crop of maize was poor, and the demand for this article was slack throughout last year, owing to fattening of cattle being reduced to the minimum extent. Cheaper sorts of food have been introduced of late in the place of maize. Prices maintained themselves, however, well during the year, whilst importations were very limited.

Maize.

Oats.	Owing to the drought the crop of oats in France was very small, i.e., only about two-thirds of an average one. In order to make up for the out-fall, large importations of Russian oats were made to this country from October to December. From July to October values were well maintained, and higher prices were paid; but after that time the oat market became unsteady and prices declined rapidly in consequence of the flooding thereof with Russian produce, above referred to. At the end of the year a steadier tone prevailed and quotations stood at average rates.
Peas.	The crop of green peas (a very important article for Bordeaux packers) was almost "nil" in this part of France last year, the great heat having withered these vegetables; and the very few cases of peas which were preserved here in 1893 were of poor quality and very high priced. In the north of France the harvest is stated to have been somewhat better.
Tomatoes.	Tomatoes were supplied in average quantities by the growers, and packers at this port were accordingly able to satisfy all requirements; prices ruling the same as in preceding years.
Beans.	The French beans which were favoured by the late summer rains, especially during September, gave a fair crop. Prices were high, however, throughout the season, but considering the comparatively restricted demand prevailing for this article, packers here were fully able to satisfy their wants.
Truffles.	Last year's quality of the truffles in this district was very good, and the production proved sufficient for the demand, prices remaining easy, and large purchases being made by Bordeaux firms.
Mushrooms.	Owing to the great competition in the mushroom trade, packers here refused to go on paying the high prices asked by growers of this article, and the consequence has been that, on the other hand, the growers, finding their labour less remunerative than formerly, have greatly restricted the mushroom cultivation, and that last year there was a scarcity of this article in the Bordeaux market. The late frosts in 1893 have rendered the situation yet more difficult for business, and prices at the end of last year stood very high.
Sulphate of copper.	The total importations of sulphate of copper to Bordeaux in 1893 are estimated to have reached about 8,000 tons, nearly all of which were of British origin. Added to the stock remaining here from 1892 (viz., about 2,000 tons), this quantity amply sufficed for all industrial and viticultural requirements. It should be noted that last year was, however, especially unfavourable for the use of sulphate of copper, inasmuch as (as reported by me above) the vineyards, in consequence of the continued dryness and heat of the atmosphere, showed hardly any traces of mildew or other cryptogamic diseases, and the usual treatment with a solution of copper was not applied to the vines, except in a very limited degree. Prices remained stationary during the year, excepting a sudden rise which took place for a time in April and May, owing to the want of steamers for bringing fresh supplies from the United Kingdom. After the required importation had

taken place here, prices dropped again; and, upon the whole, the sulphate of copper business in 1893 was not profitable for French importers.

There is little to add to the remarks made in my last year's report regarding artificial manures. Super-phosphates have continued to be imported in considerable quantities, and have become popular with those proprietors who have once begun to employ them. Other chemical products (sulphates, &c.) used against the phylloxera and other vine-diseases were not so much in demand here in 1893 for the reasons already stated, but the extent of production appears, nevertheless, to have been about the same as in previous years. Other chemical products.

The situation of the dye-woods business has remained almost the same as 12 months ago. The importations to this port found a ready sale, but in general the cargoes had already been disposed of in advance to local industries, this remark referring more especially to arrivals of campeachy wood. Dye-woods.

The total importation of all kinds of wood at Bordeaux in 1893 is stated to have been 22,979 standards, against 12,942 standards in 1892 and 56,466 standards in 1891. The figures for last year comprised 883 standards from New Brunswick, and 287 standards from British India. The fact that last year's importations, though more considerable than those of the preceding year, were below the average quantity of late years must be ascribed to the exceptionally large stocks received here in 1891 in anticipation of the increase of import duty, and that a large proportion of this stock was not sold off yet in 1892. There has, however, been an increase in the arrivals of finer qualities of wood from Sweden, the White Sea ports, and Finland, owing (as stated by me already last year) to the total want of these sorts in France itself. The outfall in 1893 in the aggregate importations was caused by diminished arrivals, more especially of wood used for building, France itself now being able to compete successfully with Norwegian and Russian sorts, and also with New Brunswick spruce. The arrivals of the two former, however, kept pretty well up to their average annual figure owing to Russian and Norwegian wood (and other articles) being subject only to the French "minimum" tariff rates; but wood and other imports from Canada to this country are hampered by their being made subject to the highest (or "maximum") duties. Wood for building, &c.

It seems certainly desirable, for the interests both of the Canadian timber trade and other branches of production, that a modification in the existing French duties on Canadian produce should soon be arrived at; and, considering that an arrangement has, in fact, already been concluded to that effect between the Canadian and the French Government, which only remains to be ratified by the legislative assemblies of both countries, it must be hoped that this latter event will take place without further delay. Projected Franco-Canadian commercial convention.

The total number of oysters bred and reared at Arcachon (near Bordeaux) and exported thence during the year 1893 is (1694). Oysters.

estimated to have reached between 150,000,000 and 180,000,000. Of these about 50 per cent. were consumed in France itself, 30 per cent. or thereabouts were exported to the United Kingdom, and the remainder to other countries. A large number of the Arcachon oysters exported to England are fattened there, and then brought to market, as a rule, as "natives."

Report of
disease
amongst
French
oysters
untrue.

It has already been reported by me at the time that the allegation which found its way into many French and other newspapers, viz., that an epidemic disease had broken out among the oysters in this country, and that many persons who had eaten French oysters had fallen ill, has, after official investigation, been found to be untrue.

Population and Industry.

Population.

Increase of
population
due entirely
to
immigration.

Births,
deaths, and
marriages.

Bordeaux, the capital of the Gironde (the largest department of France), numbers 252,102 inhabitants, and is accordingly, in point of population, the fourth largest city of the Republic. This number is an increase of 11,520 inhabitants upon the year 1885, and of about 30,000 upon the year 1881; but inasmuch as the annual number of deaths has during the whole of the last decade exceeded that of the births, it is evident that the increase of population in this town has been due exclusively to immigration, which has taken place more especially from the surrounding rural districts, but to some extent also from more distant parts of France, and also from foreign countries. The total number of foreigners now residing at Bordeaux is about 5,000 or 6,000, of which about 700 are stated to be British subjects.

The following table will show the comparative number of births, marriages and deaths in this town during each of the last five years, viz.:—

Description.	Annual Number at Bordeaux.				
	1889.	1890.	1891.	1892.	1893.
Births	5,388	5,167	5,273	5,319	5,318
Deaths	6,247	5,977	6,264	5,687	5,829
Marriages	2,610	1,986	2,017	2,204	2,100
Dissolutions	98	95	136	162	97

Excess of
death-rate
over birth-
rate
continues.

It will be observed that, whilst the number of births last year remained almost stationary, the number of deaths increased by 172, compared with the figures for 1892. Compared with the figures referring to 5 years ago, there would seem to have been an increase in 1893 in the number of deaths, but a decline in the number of births. The continued excess of the annual death-rate over the birth-rate during each of the last five years, which appears from the preceding table, is undoubtedly a somewhat serious matter, especially as this circumstance seems, both at Bordeaux and in other parts of France, to be owing less to an

unusually high annual death-rate, than to the comparative unproductiveness of the native population.

Unproductiveness of native population. Sanitary condition of Bordeaux.

Whilst the very large superficial area occupied by the town of Bordeaux (viz., nearly one-third that of Paris) renders police supervision and all administrative arrangements more difficult and more expensive than in compactly-built cities, and accounts probably to some degree for the still existing want of a proper drainage system, these disadvantages are somewhat compensated by the circumstance that, excepting in the older parts of the town, the dwelling-houses are inhabited by only one or two families, and that the wide streets and numerous private gardens offer a comparatively large amount of light and air to the inhabitants.

The health of Bordeaux in 1893, notwithstanding the long-continuing heat, was upon the whole satisfactory, and neither Asiatic cholera nor any other dangerous epidemic disease appeared here. A certain number of cases of small-pox occurred during the year, but there were only 74 cases of death from this disease in 1892, against 284 in the preceding year. Typhoid fever caused 83 deaths in 1893, against 71 in 1892.

Health of town in 1893.

By far the largest proportion of deaths, viz., 972, was again caused by consumption and other tuberculous diseases, which seem to prevail here in spite of the comparatively mild climate, at an annually-increasing rate. It has already been observed by me on a former occasion that the continued terrible ravages made by these diseases amongst the population both of this and many other parts of the world (and which appear to carry off more persons than any other malady) have, during the last few years, led several physicians and other noteworthy persons in France to form a league for diffusing the knowledge of the best-known remedies against the spread of infection of tuberculous diseases, and for introducing these remedies more especially in schools, and in other establishments where children and young persons congregate in large numbers. A branch of this league has now been established also at Bordeaux.

Tuberculous diseases.

League against spread of tuberculous diseases.

The institution of the so-called "Ambulances urbaines," or ambulance stations, in various parts of this town, for offering immediate medical assistance to persons injured by accidents, or taken ill in the streets, which is maintained by private contributions, has since its establishment three years ago done excellent work. For, during the period mentioned, no less than 15,000 cases of injuries or sickness have been attended to by the 30 stations of this institution.

"Ambulances Urbaines."

The construction of a large municipal disinfecting apparatus or stove, to be used more particularly in times of epidemic diseases, has recently been decided upon by the authorities of Bordeaux.

New disinfecting apparatus.

Bordeaux and the remainder of the Gironde department though containing a certain number of industrial establishments, is not (as I have observed already in former reports) one of the more important manufacturing districts of France, for the large

Industries,
chiefly
trade,
shipping, and
viticulture.

majority of the working classes are engaged in trade and shipping, and in the various branches of commerce and agricultural industry connected with the wine trade and production. Apart from the several kinds of industry bearing upon viticulture and the wine trade, viz., cooperage works, glass works, capsule factories, cork factories, there are some important manufactories which carry on other industries. Amongst these latter the more prominent establishments are, factories for preserving and packing fruit, vegetables, meats, and fish; liqueur distilleries, sugar refineries, oil mills, petroleum refineries, wool-washing mills, pottery works, chemical works, iron foundries, machinery works, numerous establishments for drying codfish, a large Government tobacco and cigar factory, &c.

Shipbuilding
has declined.

Shipbuilding and the several industries dependent thereon have (with the exception of some war vessels built, and still building, here for account of the French Government) almost come to a standstill at this port since about 10 years; and the high bounties offered by the State to French-built sea-going vessels have, in this district at least, as already observed in Part I of this report, been unable to reanimate this once flourishing branch of industry. French shipowners, in spite of the premium offered to ships built in this country, find it upon the whole more profitable to buy their vessels in the United Kingdom.

State
bounties to
ships built in
France.

Strikes among the working classes have hitherto been rare at Bordeaux; but last year a general strike took place amongst the workmen of all kinds engaged in the building trade and lasted several weeks, after having given a good deal of trouble to the authorities of the town. A short strike took place here also amongst the journeymen bakers last year.

Public Works.

New quays.

It is expected that the construction of the new quays on the left bank of the river in Bordeaux harbour will be finished in the course of the present year; and there can be no doubt that the completion of this work, which will render about 1,700 additional yards of quay room available for loading and unloading, will be of great benefit to shipping visiting this port.

Depth of
water at
Bordeaux for
sea-going
ships.
Mud in the
river.

On the other hand it would seem that, in order to prevent these or other facilities offered to sea-going vessels from becoming to a certain extent illusory, more energetic measures must be used to maintain a proper depth of water for such vessels in this harbour. The accumulation of mud in the river here during the past 12 months, owing more especially to the long continued drought, has been very great and has been a source of serious inconvenience, not to say danger, to shipping. Vessels of large draught have been frequently unable to moor alongside the river bank, or have moored there only at considerable risk, and the access to the docks has been often impracticable excepting during specially

Insufficient
depth of
water.

favourable tides. It appears that the Government authorities have lately decided to carry out more efficacious dredging operations, in order to put the river into a satisfactory condition; some doubts are, however, entertained amongst shipping classes at Bordeaux, whether the sum allotted by the Government for the dredging expenses will be sufficient to effect this very desirable end.

The Chamber of Commerce has recently decided to construct a second graving dock at Bordeaux, and to lengthen the one already in use, the cost being estimated at about 60,000*l.* for these two works.

A new building has been erected in this town for the use of the Post Office, and will be shortly opened to the public.

The construction of the new railway terminus of the South of France Company is proceeding very slowly, and will not apparently be finished for some time yet.

A new building for the Bordeaux fire brigade has been recently completed, and is about to be taken into use.

An association for the erection of cheap lodging-houses, in the construction of which particular care is to be given to the sanitary arrangements, has lately been formed here on similar principles to those already existing at Marseilles, Lyons, Orleans, Rouen, &c. The Bordeaux association intends to reserve to itself the selection of the tenants of its lodging-houses; but these tenants are to have the option of occupying their lodgings on short leases, or of becoming owners thereof in the course of 20 years by paying certain fixed annual instalments of the purchase money. The association further proposes to limit the maximum annual interest payable to the shareholders in the undertaking to 4 per cent.

It may not perhaps be generally remembered that a law was passed in France in 1879 by which the State was authorised to purchase all the larger canals of this country, in order that the traffic on these highways of commercial intercourse, most of which were at that time still in private hands, should gradually be freed from all charges. Whilst the provisions of this law were carried out in most parts of the country, and the traffic on about seven-eighths of all French canals has thus become exempt from all charges, a different course appears to have been adopted by the Government in south-western France. For here, instead of taking into its own hands the rather important canal which traverses the country from west to east (the western portion being called "Canal latéral à la Garonne," and the eastern, the "Canal du Midi"), the Government concluded an arrangement with the South of France Railway Company, in virtue of which the latter (instead of receiving a certain sum, granted by the State as a subvention to all the large French railway companies) became proprietor of the western portion of the canal, whilst the eastern portion was left in the hands of another private company.

The traffic on both portions of this canal has accordingly continued to be subjected to certain charges, and the South of France Railway Company moreover, after thus acquiring the

Dredging operations.

Proposed new graving dock.

New post office.

Proposed new railway station.

New building for fire brigade. Lodging houses.

Canals in south-western France.

Monopoly of canal and railway.

Protest of
inhabitants
of south-
western
France.

monopoly both of the chief water-way and of the railways in south-western France, is considered here to have systematically favoured the traffic on the latter to the detriment of that on the canal which, according to the prevalent opinion of the industrial, agricultural, and commercial classes of this district, has become quite useless to them. These classes have accordingly for some years already demanded that the Government should, without further delay, take the canals of southern France, like those in all other parts of the country, into its own hands, and that the traffic thereon shall be freed from all charges.

Important
public
meeting at
Toulouse.

In order to impress this demand more forcibly upon the Government, a large meeting was held at Toulouse in January of the present year, and was attended by numerous senators, deputies, and delegates from commercial and other public bodies of south-western France, and a unanimous resolution was passed that the benefits arising from the purchase by the Government, and from the gratuitous use of the canals in other parts of the country, ought not to be any longer withheld from the inhabitants of the southern and south-western districts.

Canals not
available for
seagoing
ships of
larger
draught.

I may here observe that the canal to which special reference has been made above, viz., the "Canal latéral à la Garonne" and the "Canal du Midi," is not available for sea-going vessels (except those of very slight draught), as its average depth is only 6 to 7 feet, its width being about 60 feet. The canal connects Bordeaux with Cette; but it is accordingly used almost exclusively by barges and vessels of a very small class.

Project of
ship-canal
from Atlantic
to Medi-
terranean

The project of connecting the Atlantic and Mediterranean by a ship canal of sufficient dimensions for affording a convenient passage to the largest merchant vessels, and also to the largest war-vessels of the French navy has, during the past year, assumed a somewhat more definite shape through the formation of a French company which expresses its intention of building and maintaining such a canal without any pecuniary aid or guarantee from the French Government, if the public will provide the money required for the work. As a preliminary step towards realizing the undertaking, the company has invited French engineers to compete in drawing up plans and estimates of the cost of the projected canal, prizes being offered for the best; and the public is to be invited to subscribe for shares when the selection of the best plan shall have been made. In order to render the whole undertaking a purely national one, the company further proposes that only French engineers, contractors, and workmen, and only French materials shall be employed in the work.

Preliminary
steps by
French
company.

There can be no doubt that if only the work could be carried out at a reasonable cost, the "Canal des Deux Mers" (as it is to be called) would, especially for French interests, be a useful undertaking, quite apart from the question as to its importance for this country in time of war; for it would certainly give a very important impulse to the development of the agricultural, industrial, and commercial interests of the fertile

districts of southern France, and it would likewise offer certain advantages to shipping, both to that of France and of all other seafaring countries.

The question is, however, whether the cost of the undertaking would not be out of all proportion to the advantages expected from it; and furthermore, whether, supposing this first question could safely be answered in the affirmative, it will be found possible to raise sufficient money to carry the enterprise into effect.

Question as to cost.

At the meeting which, as above mentioned, was held at Toulouse in January, and which was attended by leading representatives of the southern departments of France, it was decided that until the question of the redemption of the existing canals of southern France shall have been satisfactorily settled, that of the proposed construction of the "Canal des Deux Mers" cannot be taken into consideration.

Opinion of Toulouse public.

I may perhaps add, that at Bordeaux the opinions of the leading classes are, so far at least, not favourably disposed towards the project of the "Canal des Deux Mers"; it is thought here that the undertaking, even if it were possible to find the means of carrying it out, which is considered unlikely, would most certainly be a financial failure.

Opinion at Bordeaux unfavourable.

General Remarks.

A proof of the unfavourable condition of most branches of business at this port in 1893 is afforded by the statement contained in the recently published Annual Report of the Bank of France, that the total amount of business done by the Bordeaux branch in 1893 experienced a diminution of 213,000*l.*, the same having reached only 21,834,760*l.*, against 22,048,570*l.* in 1892. On the other hand, Bordeaux maintained its rank as second in importance amongst the various provincial branch banks both as regarded the total amount of its business and also as regarded the total net profits, it stood second only to Lyons in the first, and second only to Havre in the latter respect. As regarded the total value of its annual deposits, Bordeaux continued to hold last year the first place, after Paris; the same having reached here 8,877,400*l.* The rate of discount remained at 2½ per cent. during the year, the same having in fact not varied since May, 1892.

Bordeaux branch Bank of France.

The recent conclusion of a commercial convention between this country and Spain, by which the latter has agreed, in return for the application by France of its minimum tariff rates on goods imported from Spain, to grant to France during the year 1894 (unless notice of the abrogation of the convention should be given before expiration of such period) all commercial advantages accorded to any other country, has given some satisfaction at Bordeaux. It is thought here, however, that the comparatively limited scope of the advantages obtained by this convention for French commercial interests is a further unsatisfactory consequence of the impracticable principle adopted in France of refusing to

Opinions at Bordeaux on Franco-Spanish commercial convention.

Consequences of minimum tariff rates.

grant any reductions of import duties below the "minimum" rates fixed by the French tariff of 1893.

Effect of
abrogation of
Franco-Swiss
commercial
convention
upon wine
export trade
to Switzer-
land.

The adoption of this principle was, as is well known, the cause of the rupture of the commercial negotiations between France and Switzerland about a year ago; and it cannot be denied that this rupture and the subsequent "tariff war" between the two countries has had a very prejudicial effect upon their commercial relations. The wine export trade, for instance, from this district to Switzerland, which used to be of considerable importance, has dwindled down to a quite insignificant figure during the past 12 months.

Hopes at
Bordeaux of
speedy
ratification
of proposed
Franco-
Canadian
commercial
convention.

Some disappointment is felt here that the proposed commercial arrangement between the Dominion of Canada and the French Republic has not yet been formally submitted to the approval of the French legislative bodies, especially as the draft project thereof was distributed in the Chamber of Deputies already a year ago. The Bordeaux wine trade in particular hopes to derive advantages from the conclusion of this Franco-Canadian convention; but there can also be little doubt that the Canadian export trade, especially in wood and in preserved goods, will be benefited by being admitted into France at the "minimum" tariff rates.

Efforts at
Bordeaux to
obtain reduc-
tion of United
States import
duties on
French wines.

The desire of creating fresh outlets for the now increasingly large stock of wine in the Bordeaux district has during the past year also led to strenuous efforts being made here, by means of special delegates sent to the United States of America and by other measures, towards obtaining an important abatement of the wine import duties in that country. It is hoped here, that the new wine duties which are about to be established in America will be sufficiently low to enable the Bordeaux market to export in future also the lower priced wines of this district, and that thus a considerable impulse may be given to the consumption of these wines in the United States, where, of late years, the excessively high rates of duty have restricted consumption almost entirely to high priced wines.

Association
for Promotion
of Science.
Meeting in
1895

The French Association for the Promotion of Science will hold its annual meeting for the year 1895 at Bordeaux; and the leading representatives of the university, the municipality, and of all the learned societies of this town have already formed a committee for the purpose of making the necessary preparations for the event, which, in view of the high standing of this association, is to be rendered as brilliant as possible.

International
Exhibition
of 1895

As already mentioned in my last annual report, the International Exhibition which was to be held at Bordeaux in the year 1894 has been put off until the year 1895. It is now announced by the Philomathic Society at Bordeaux, which is organising the undertaking, that the Bordeaux Exhibition of 1895 is to be a universal one in so far as regards exhibitors of wines and spirits, and of electrical apparatus and of all matters connected with electricity, and likewise with social science; but that the general, industrial, and agricultural portion of the exhibition is to be international in a restricted sense only, that is to

say this latter part is to be open only to exhibitors from France and French possessions, from the United Kingdom, from Belgium, from Switzerland, from Italy, from Spain, and from Portugal, or in other words from all neighbouring countries (excepting Germany). One of the prominent features of the Bordeaux Exhibition will of course be the section relating to wines; and it may be presumed that some of our colonies, which have of late years made such rapid strides in viticulture, will take the opportunity of sending samples of their produce to Bordeaux next year. Considering, moreover, the prominent share taken by British trade generally in the commerce of this port and district, and the desirability for all concerned that our commercial relations with Bordeaux shall not merely be maintained in their present extent, but, if possible, developed more and more, it may be hoped that exhibitors from the United Kingdom will regard the forthcoming Bordeaux Exhibition as a favourable opportunity for attaining that end.

Expected participation of United Kingdom and of British wine-growing colonies in Bordeaux Exhibition.

Particulars regarding the Exhibition will, of course, be reported by me for the information of the public at home, as soon as the same shall have been communicated to me by the executive committee at Bordeaux.

BAYONNE.

Mr. Vice-Consul Leeson reports as follows:—

There was an increase in the total number of vessels entered, and in the total number of vessels cleared.

RETURN showing Increase of Total Shipping at Bayonne for the Year 1893. Total shipping in 1893.

	Number of Vessels.	Tons.
Entered	76	16,186
Cleared	75	219,722

RETURN showing Increase and Decrease of British Shipping at Bayonne for the Year 1893. British shipping in 1893.

	Number of Vessels.	Tons.
Entered, increase	5	6,219
Cleared, decrease	2	2,313

ARRIVED FROM GREAT BRITAIN WITH CARGO.

Year.	Number of Vessels.	Tons.	Articles.	Tons.
1893	83	54,846	Coal	95,329
1892	92	59,526	"	125,792
Decrease, 1893 ..	9	4,680		13,373

ARRIVED FROM FOREIGN PORTS WITH CARGO.

British ships
entered.

Country.	Number of Vessels.	Tons.	Articles.	Tons.
Russia	6	6,467	Wheat	12,780
Romania	6	6,593	"	13,155
America	4	5,176	"	10,470
India	1	1,071	"	2,109
France	1	581	Cressote	550
Spain	1	746	Ore.	1,479
Total, 1893 .. .	19	20,544		41,825
" 1892 .. .	18	18,648		36,505
Increase, 1893 ..	1	1,896		4,320

ARRIVED FROM FOREIGN PORTS IN BALLAST.

Year.	Country	Number of Vessels.	Tons.
1893	France	15	10,844
	Spain	4	2,656
	Total	19	12,500
1892	"	6	2,587
1893	Increase	13	10,013

CLEARED FOR GREAT BRITAIN.

British ships
cleared.

	Number of Vessels.	Tons.	Articles.	Tons.
With cargo, 1893 ..	30	20,248	Pit-props and resin	23,980
In ballast, 1893 ..	4	4,195		
Total	34	24,443		23,980
" 1892	31	24,438		38,555
Increase, 1893 ..	3			
Decrease, 1893 ..		15		6,575

CLEARED FOR FOREIGN PORTS IN BALLAST.

Year.	Country.	Number of Vessels.	Tons.
1893	Spain	82	56,005
1892	"	84	55,983
1893	Decrease	2	..
1893	Increase	..	22

RETURN of Principal Imports in the Year 1893.

Principal imports in 1893.

Articles.	From—	Quantity.
		Tons.
Coal.. .. .	England	188,601
Grain	"	39,805
Sardines	Spain	1,504
Iron ore	"	146,098

RETURN of Principal Exports in the Year 1893.

Principal exports in 1893.

Articles.	To—	Quantity.
		Tons.
Timber, pit-props	England	128,579
Planks and red wood sleepers	Spain	28,332
Resin and turpentine	England and Germany	3,964

Population, according to census, 1891, 25,530.

Population.

Year.	Births.	Deaths.	Marriages.
	Number.	Number.	Number.
1893	516	529	133
1892	459	530	156
Increase, 1893	57	..	..
Decrease, 1893	..	51	23

The general health was good.

No new public works have been commenced.

The bar at mouth of River Adour has been very difficult, owing to the continual shifting of the channel and insufficiency of water in the river to scour it.

There were two British steamers stranded entering the river.

The "Cardiff Castle," 1,266 tons register from Black Sea with

Health of Bayonne.
Public works.
Difficulty of entering port of Bayonne.

Casualties of British ships.

wheat, and the "General Gordon," 806 tons register, from Ardrossan with coal.

The former was badly strained, the latter was seriously damaged, having run into the north pier, smashing five cylinders of foundations and carrying away 27 yards of superstructure; had to give bail of 3,500*l.* before allowed to leave. There were no lives lost.

New dry dock. The new dry dock progresses but slowly.

Annex A.—RETURN of all British Shipping at the Port of Bayonne during the Year 1893.

ENTERED.

Year.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1893	...	...	121	87,980	121	87,980
1892	...	...	116	81,561	116	81,561

CLEARED.

Year.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1893	...	...	116	80,412	116	80,412
1892	...	...	118	82,725	118	82,725

RETURN of all Shipping at the Port of Bayonne during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	121	87,980	121	87,980
Spanish	83	4,260	113	42,560	196	46,820
German	1	82	1	320	2	402
Irish	...	...	20	8,651	20	8,651
Norwegian and Swedish	2	560	2	1,018	4	1,578
Danish	2	137	...	...	2	137
Greek	...	...	1	564	1	564
French	172	10,684	373	14,392	545	25,076
Total	396	15,113	691	282,697	1,087	297,810

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	116	80,412	116	80,412
Spanish	92	4,220	124	221,558	216	225,778
German	1	82	...	...	1	82
Belgian	...	...	19	8,206	19	8,206
Norwegian and Swedish	2	660	2	1,048	4	1,708
Danish	2	137	...	...	2	137
Greek	...	...	1	704	1	704
French	173	12,994	370	153,373	543	166,367
Total	270	18,093	632	465,301	902	483,394

RETURN of British Shipping compared with that of all other Nations during the Year 1893.

Nationality.	Entered.		Cleared.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	121	87,980	116	80,412
All other nations ..	770	190,370	786	402,982

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FRANCE.

HAVRE.

Consul-General Bernal to the Earl of Kimberley.

My Lord, *Havre, March 15, 1894.*

I HAVE the honour to enclose herewith my Report on the Navigation, Commerce, Trade, &c., of Havre, together with those from the British Vice-Consuls at Caen, Honfleur, Trouville-Deauville, Fécamp, and Dieppe, for the year 1893.

I have, &c.
(Signed) **FREDERIC BERNAL.**

Report on the Navigation, Commerce, Trade, &c., of the Consular District of Havre for the Year 1893.

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Introductory.

Introductory.

Were it possible for me to make out my annual commercial report from the statistics which I have under my own hand at the Consulate-General I could draw it up several weeks earlier, but I am unfortunately dependent on other sources for some of the information I require, and I cannot obtain it as soon as I could wish.

General
review of
commerce
and trade in
1893.

The year 1893 was very far from being a favourable one for the commercial interests of Havre. Except in isolated instances, every one complained of the stagnation of business, and of the increasing difficulty of working at a profit. It is true that imports of raw material did not fall off to any great extent, with the exception of those of wheat and cotton (the latter owing to the lateness of the crop in the United States), which showed a collective reduction of some 122,000 tons, but against that must be placed the increase in the imports of oil-seeds, other grain, and dyewoods, which, without including other smaller additions, amounted to some 88,000 tons. In point of fact the total entries of shipping, excluding the French coasting trade, show an increase of 184 vessels, and of 188,637 registered tons. But as I have pointed out in previous reports, a very large proportion of the trade of the port of Havre is of a transit character, while, as regards other articles, the fall in the price of cotton was unfavourable to the always bullish tendency of the Havre market, and the failure of a large speculator in Paris, who was engaged in enormous transactions in coffee here, was not calculated to make the year's results more profitable. There were, however, no failures of any note among the local houses of business.

RETURN of all Shipping which Entered the Port of Havre
during the Year 1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	98	75,202	950	825,397	1,048	900,599
" packets ...	...	...	208	66,327	208	66,327
French ...	74	26,958	686	825,463	710	852,421
Russian ...	17	8,003	26	16,349	43	24,352
Swedish ...	28	9,083	43	23,709	71	32,792
Norwegian ...	107	46,183	64	29,997	161	76,180
Danish ...	49	8,270	25	19,470	74	27,740
German ...	29	18,045	241	389,445	270	407,490
Dutch ...	4	1,609	64	35,776	68	37,385
Spanish ...	...	...	26	58,755	26	58,755
Portuguese...	...	...	12	6,059	12	6,059
Italian ...	10	7,731	...	...	10	7,731
Austrian ...	2	784	4	3,647	6	4,431
Belgian ...	...	...	4	2,688	4	2,688
American ...	2	4,313	...	...	2	4,313
Total ...	420	206,181	2,293	2,303,082	2,713	2,509,263
Coasting trade, French...	1,686	139,180	2,099	394,555	3,785	533,735
Grand total ...	2,106	345,361	4,392	2,697,637	6,498	3,042,998

The foregoing statistics are taken, as regards British shipping, from the official register kept at the Consulate-General; as regards French shipping, from the data furnished me by the custom-house; and as regards other foreign flags, by information given me by my respective colleagues. From whence the statistics are derived.

From the above figures it appears that the total entries of shipping in 1893, excluding the coasting trade, showed an increase of 184 vessels, and 188,637 tons. Towards this increase British shipping contributed 24 vessels, and 44,000 tons. French shipping increased about 115,000 tons; Norwegian 9,000 tons; German 32,000 tons; Spanish 30,000 tons; Portuguese 2,000 tons; and Austrian 2,000 tons; while Danish fell off about 3,400 tons; Dutch 4,000 tons; Italian 8,000 tons; and United States of America 31,000 tons. With the diminished imports of wheat and cotton, the latter owing, as I have said before, to the lateness of the crop in America; the number and registered tonnage of British vessels arriving from ports in the United States, which were 254, of 390,137 tons in 1891, and 184 of 290,793 tons in 1892, further decreased to 137 of 230,287 tons in 1893. This falling off was made up by entries of our shipping from other countries, and especially by the increase of steamers from British-India, bringing oil-seeds which were required owing to the almost total failure of the colza crop in France. Of the 1,256 British vessels which entered, 333 of 446,989 registered tons were in the indirect trade, against 325, of 434,730 tons in 1892, and 432, of 553,549 tons in 1891. 427,715 bales of cotton were brought in British bottoms from the United States, against 477,813 in 1892, and 361,353 in 1891; but the imports of cotton from British-India in our vessels further decreased from 70,713 bales in 1892, and 75,005 bales in

1891, to 44,232 last year. The imports of coal in British vessels were 528,190 tons, against 597,425 tons in 1892, and 572,472 tons in 1890. The strikes of coal miners were the cause of this decrease.

Seamen on
board British
vessels.

The total number of seamen who entered the port on British vessels last year were 21,889, to which must be added 6,068, being the total number of the crews of the London and South Western Railway Company's steam packets on their various voyages. Of the aggregate number 1,524 were discharged; 913 shipped, and 75 reported as deserters. Of the 1,524 discharged, 495, or 31 per cent., were foreigners. The total amount of wages paid to the men discharged at the Consulate-General was 22,081*l.*; and the number and amount of seamen's money orders issued were 381, for 7,256*l.* In connection with these figures it must be borne in mind that the foreign seamen, 31 per cent. of the total number, nearly always go to their homes, and take their wages with them. In fact, only 35 money orders, for a total amount of 678*l.*, were issued to this category of men discharged, which goes to prove the truth of my statement. At this port, where there are no large importations of nitrate and guano, as at Dunkirk, it is only when a deficient harvest obliges France to import wheat from California and Australia, as has happened during the last 3 years, that we have any arrivals here of large sailing ships, with the consequent paying off of the crews, and the issue of money orders to the men.

I cannot but bear testimony to the very large number of well-behaved seamen who were paid off here last year, and I do so with the greater pleasure that I have on former occasions found myself obliged to speak, without fear or favour, in plain terms, in an opposite sense, of facts which have come under, or been brought to my notice. I do not say that there have not been many instances of men presenting themselves at the Consulate-General mad, or so stupefied with drink given them by the kind attentions of their friends (?) on shore, as to make one ashamed of their conduct there, and outside, but their number have been very decidedly less, and that of those against whose behaviour not a word could be said proportionately larger. I am more and more convinced that a good captain makes a good crew, and that when the former is known by his men to be, while firm and strict, at the same time temperate and just, his vessel is pretty sure to be a comfortable one for all hands. I cannot help thinking that some of the improvement I have noted may be fairly attributed to the good work done in so many ports at home and abroad by "The Missions to Seamen," and other kindred philanthropic societies, &c.

No complaint was made to me last year respecting the unworthiness of, or the bad provisions on board any vessel.

Absence of
complaints of
unseaworthi-
ness or bad
provisions.
Continuous
discharges.

I cannot but regret that another year has passed away without it having been found possible to institute a system of continuous discharges. I feel almost certain it would prove a benefit to both shipowners, captains, and men, and that under such a system the "hard bargains" would soon get weeded out.

There was a considerable decrease last year in the number of French seamen shipped here in British vessels for long voyages, some steamers running hence to United States ports, on which many were formerly shipped as firemen and stokers, having ceased to take them. I have been told, though I cannot vouch for the truth of the statement, that the reason is their not understanding the working of English engines and machinery.

Decrease in the number of French seamen engaged.

If one may judge from the complaints which appear from time to time in the newspapers, the increased protection which was given to French shipbuilders and shipowners by the law which came into force on January 1, 1893, does not appear to have given the satisfaction which was expected from it. The builders complain that the shipowners do not encourage and support them by giving enough orders for vessels. The owners reply that their prices are too high, and the time taken to build a vessel too long. However this may be, the latter have not yet altogether ceased buying from us, although they gain no navigation bounties on the vessels thus purchased. But the French shipping interest has suffered, like its foreign competitors, from the ruinous lowness of freights, which have reduced, if they have not altogether wiped out, the dividends hitherto earned.

Apparent results of the increased bounties on shipbuilding and navigation.

The number of emigrants who embarked last year at Havre for foreign countries was 20,323, against 26,530 in 1892, and 34,930 in 1891. They comprised 2,313 French, 6,584 Italians, 5,967 Germans, 4,649 Swiss, 2,068 Austrians, 2,055 from Alsace-Lorraine, 1,823 Russians, 658 Turks, &c. They were classified as to their professions under the heads of agricultural, 10,159; industrial, 6,444; professional, 273; various, 900; of no profession, 2,547.

Emigration from Havre.

TABLE showing Total Entries of British Shipping (not including Packets) in the Six Principal Ports of the District of the Consulate-General of Havre in the Years 1893-92.

Ports.	1893.		1892.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Havre	1,048	900,599	1,074	869,316
Caen	304	88,504	304	96,896
Trouville	106	35,298	109	39,319
Honfleur	149	62,781	129	62,484
Fécamp	54	15,991	58	18,441
Dieppe	398	176,392	422	174,551
Total	2,059	1,279,565	2,096	1,261,007

At the minor ports of Ouistréham, Courselles, Port en Bessin, Isigny, and Dives, 49 British vessels, of 6,824 registered tons entered. At those of Tréport and Eu, 257 vessels entered, but (1705)

Entries of British shipping at minor ports.

Mr. Vice-Consul Lee-Jortin has not been able to obtain their tonnage.

Details of
passenger
service.

In addition to the above, the packets of the London and South Western Railway Company, and of the London, Brighton, and South Coast Railway Company, at Havre, Honfleur, Caen, and Dieppe, were 1,081, of 292,180 tons register.

Daily
passenger
service to and
from
Southampton.

Instead of only three times a week the London and South Western Railway Company now run their passenger steamers from and to Southampton every night except Sunday, and it is to be hoped that this convenience to travellers may meet with the success it deserves. One of the boats regularly running, a double screw, does the passage in about 6 hours, while the other, which is a paddle wheel, takes 8 hours. The times of departure have been altered to 11 P.M. from Southampton, and 11.45 P.M. from Havre, which are not as convenient as the old hours of 12 P.M. and 9 P.M. It is, however, rumoured that a fixed day service, with vessels only taking 6 hours to do the passage, will ere very long be commenced. This would please the majority of travellers. The great difficulty is to get boats of high speed which can come into the harbour at low water of spring tides, for it is no good their being able to run across in 6 hours if they have to wait outside the port 1 or 2 hours.

Trade and Commerce.

TABLE showing Imports, Deliveries, and Stocks of Cotton at Havre during the Years 1893-91.

Countries.	1893.				1892.			1891.		
	Imports.		Deliveries.		Imports.		Deliveries.		Imports.	
	Bales.	Stock, December 31, 1893.	Bales.	Stock, December 31, 1893.	Bales.	Stock, December 31, 1892.	Bales.	Stock, December 31, 1892.	Bales.	Stock, December 31, 1891.
United States ..	614,961		609,761	328,450	659,517	511,343	534,531	461,927	175,076	
Brazil ..	350		395	358	1,805	3,771	2,450	1,789	2,369	
India ..	75,027		88,537	42,844	106,970	106,568	109,399	121,881	55,452	
Other countries ..	24,367		21,898	16,173	18,852	16,176	16,471	11,492	11,028	
Total..	714,705	387,325	720,591		787,144	637,858	662,851	597,089	248,925	

HAVRE.

Imports.

RETURN of the Principal Articles of Import at Havre during the Years 1893-92.

Articles.			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
				£		£
Sugar -						
French colonies	Tons	...	1,689		2,642	
Boracine	"	...	298		298	
Cocoa	"	...	20,413		14,130	
Coffee	"	...	183,640		168,547	
Coal	"	...	576,924		594,468	
Copper	"	...	18,349		7,296	
Cotton	"	...	13,114		17,140	
Dyewoods	"	...	84,644		70,876	
Hides	"	...	23,194		21,444	
Indigo	"	...	560		778	
Lard	"	...	3,847		12,726	
Oil seeds	"	...	62,392		36,268	
Palm oil	"	...	16,066		10,121	
Pepper	"	...	2,636		4,897	
Petroleum	"	...	36,238		26,660	
Rice	"	...	8,804		5,343	
Salt meat and pork	"	...	833		833	
Timber deals	"	...	22,700		44,746	
Wheat	"	...	228,993		317,577	
Other grain	"	...	40,785		13,521	
Wool	"	...	12,800		11,662	
Total		...	1,405,906		1,462,206	
Alcohol	Gallons	...	6,921		1,115,510	
Wine	"	...	7,944,621		13,923,822	

Exports.

RETURN of the Principal Articles of Export at Havre during the Years 1893-92.

Articles.			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
				£		£
Tissues—						
Silks and ribbons	Tons	...	1,806		1,352	
Woollen	"	...	3,787		5,080	
Cotton	"	...	7,380		7,086	
China-ware	"	...	887		1,131	
Glass-ware	"	...	1,886		1,791	
White paper	"	...	4,776		4,263	
Ochre	"	...	795		1,032	
Potatoes	"	...	10,066		10,274	
Salt butter	"	...	3,919		3,699	
Oils	"	...	2,826		3,717	
Oil-cake	"	...	11,209		11,298	
Dyes and essences	"	...	10,945		9,956	
Drugs and medicines	"	...	2,786		2,765	
Preserved vegetables	"	...	689		1,542	
Hosiery	"	...	718		696	
Total		...	63,847		65,662	
Furniture	Value	...		France, 3,937,689		France, 285,487
Millinery	"	...		7,897,150		6,761,519
Wine	Gallons	...	1,413,663		1,563,902	

**COMPARATIVE Statement of the Imports of Certain Articles of
British Production at Havre in the Years 1893-92.**

Articles.		Quantity.	
		1893.	1892.
Pork (hams, bacon)	Tons	87	82
Salted beef, &c.	" " "	144	20
Tinned meats	" " "	31	524
Artificial manure	" " "	1,750	823
Fresh fish	" " "	63	126
Tinned lobsters, &c.	" " "	263	195
Seeds	" " "	164	261
Sweet biscuits	" " "	48	61
Preserves	" " "	4	2
Beer	{ " " "	121	..
	Gallons	..	27,500
Coal tar	Tons	7,007	7,657
Boric acid	" " "	51	79
Caustic soda	" " "	61	31
Bi-carbonate of soda	" " "	28	50
Crude salts of ammonia	" " "	11	410
Chloride of lime	" " "	10	26
Superphosphate of lime	" " "	2,296	3,381
Sulphate of copper	" " "	89	28
Oil paints	" " "	105	66
Made-up medicines	" " "	13	3½
Cotton tissues—			
White.. ..	" " "	136	301
Dyed	" " "	151	186
Prints	" " "	1	80
Agricultural machines.. ..	" " "	93	99
Ironmongery	" " "	22	36
Anchors, cables, chains	" " "	82	142
Iron tubing	" " "	31	15
Household ware (painted or tinned)	" " "	28	100
Felt hats	{ " " "	17	..
	Number	..	2,342

Of the above articles, salted meats, artificial manures, tinned lobsters, &c., caustic soda, sulphate of copper, medicines, and oil paints, alone show any appreciable increase, while tinned meats, fish, seeds, sweet biscuits, boric acid, bi-carbonate of soda, crude salts of ammonia, superphosphate of lime, cotton tissues, ironmongery, anchors and chains, and household ware, all fell off more or less. Summary of
British
imports.

The duty on beer was levied last year on the weight of the liquid and cask, and 121 tons were imported. Import of
beer.

As regards sugar, the port of Havre has lost all the little importance it once had before beetroot became so almost universally used by the Paris refiners, with whom those here found themselves competing under unequal conditions. General
imports.
Sugar.

The imports of cocoa, nearly all in transit for Paris, increased by about 7,000 tons. Cocoa.

The imports of coffee were some 3,000 tons less than in 1892, but it still remains the great medium of speculation which it has for some years past been. There were, however, no great fluctua- Coffee.

tions in prices, and the height at which they keep, joined to the losses suffered through the failure of a great Paris speculator have made people cautious, and disinclined to enter into such large operations in "futures" as they did in former years.

Cotton.

The imports of cotton fell off about 72,439 bales, chiefly owing to the lateness of the United States crop. This being another great medium of speculation here, and the tone of the market being always more of a bullish character than otherwise, the gradual fall in prices amounting to about 12 fr. per 50 kilos., coupled with the uncertainty felt as to the future position of the article, made the market a very gloomy one.

Dyewoods.

The imports of dyewoods showed an increase of 16,894 tons, of which logwood contributed 6,660 tons, and fustic, 10,130 tons. By far the larger portion of this trade is done by Norwegians, Swedes, Germans, &c., in vessels originally purchased second hand from us.

Oil-seeds.

The almost total failure of the colza crop obliged France to import a large quantity of oil-seeds from India resulting in a total increase of over 50,000 tons.

American
hams,
bacon, &c.

It was thought in the United States that the removal of the prohibition on the importation of American ham, bacon, &c., would, in spite of the duty of 25 fr. on them, and 30 fr. on salted beef, per 100 kilos., enable a business to be done in these articles; but, as I mentioned in my report last year, their importation is surrounded by such vexatious formalities that it has been found impossible to carry on the trade, to the detriment of the French working classes, and the injury of the shipping interests.

Lard.

The duty of 14 fr. 50 c. per 100 kilos. on lard has likewise nearly killed its import from the United States, which fell from 19,658 tons, in 1890; 16,964 tons, in 1891; 12,726 tons, in 1892; to 3,347 tons, in 1893.

General
summary of
imports.

To sum up, the imports of cocoa, copper, dyewoods, hides, oil-seeds, petroleum, wool, and grain other than wheat, showed a more or less increase, while those of coffee, coals, cotton, indigo, lard, salt meat and pork, timber, wheat, alcohol, and wine, fell off to a more or less extent.

Summary of
exports.

Of the articles exported, cotton tissues, glassware, white paper, salt butter, dyes, hosiery, millinery, and furniture, showed an increase, while those of silks and ribbons, woollen tissues, china-ware, ochre, potatoes, oil, preserved vegetables, and wine, decreased.

Customs
receipts.

The receipts from the customs in 1893, including the navigation dues, 1,606,078 fr.; statistical dues, 743,945 fr.; and the tax on salt, 164,808 fr.; amounted to 63,445,297 fr. (2,537,811*l.*), against 74,601,059 fr. (2,984,042*l.*), in 1892, and 70,915,646 fr. (2,836,625*l.*), in 1891.

No means of
bringing trade
circles and
price lists to
the notice of
merchants,
&c.

I am continually receiving trade circulars, catalogues, and price lists of all branches of industry and manufacture, and more or less well got up, with the request that I will bring them to the notice of possible purchasers of the articles of which they treat. But while, on the one hand, it most rarely happens that anyone comes to the Consulate-General to make enquiries which would

give an opening to bring these publications to their notice. there are, on the other, no reading rooms or place of meeting of merchants, where I could send them with any chance of their being looked at. Even were it otherwise, they labour under the great disadvantage of being drawn up in English, with English weights and measures, and prices calculated in our money, and I consider this to be a serious drawback to their utility.

Public Works.

The Chamber of Commerce, the guardians of the commercial interests of Havre, are still looking out eagerly for the long-promised, long-delayed improvements in the port and its approaches, and for the construction of the direct railroad hence to Dieppe, and of the line passing from Havre up the valley of the Seine, and crossing the river by a tunnel or viaduct, thereby placing this town and port in communication with the south-west of France. While the line to Dieppe has been so much modified from that which was originally asked for and projected as to render it incapable, in the opinion of the Chamber of Commerce, of ever being one of great importance as regards traffic, the preliminary works and formalities are being carried on with the greatest slowness, while the second line, which is of even greater importance to this port, and which was conceded to the Western Railway Company of France in 1883, is still hung up by that Company's opposition to the projected tunnel under the River Seine.

Public works.
Delay in the construction of new railroads, and in the long projected improvement of the port.

The project for the improvement of the port of Havre which has for 11 years been under discussion before various Commissions, and also before the Chamber of Deputies and the Senate, is once more presented to the first-named chamber. Reduced from the original estimated cost of 88,000,000 fr. (3,520,000*l.*) to 42,500,000 fr. (1,700,000*l.*), of which sum 27,500,000 fr. (1,100,000*l.*) will be allotted to this port, and the remainder to the improvement of the Lower Seine, the scheme comprises the construction of a new outer harbour; extensive dredging operations within, and in the channels leading to it; the construction of a half-tide basin giving a direct and deeper entry to the Eure and Bellot docks; and works for consolidating Cape La Hève. Half of the sum of 27,500,000 fr. will be defrayed by the department, the town, and the Chamber of Commerce, the amount offered by the latter being 9,685,500 fr. The carrying into execution of these works without any further delay is of vital importance to the town and port of Havre, which, in addition to the unceasing efforts made, and improvements effected by its competitors to the north, now finds itself seriously menaced in its transatlantic passenger trade by the port of Southampton.

As regards minor works, the new petroleum dock to the east of the "Bassin Bellot," which was commenced in October, 1892, will be completed about the middle of this year.

The Chamber of Commerce voted a sum of 2,000*l.* towards deepening, at a total cost of 5,400*l.*, the "Bassin Vauban," or collier dock, so as to admit the entry of steam colliers of a large tonnage.

They also voted a sum of 765,000 fr. (30,600*l.*) for the purchase of land at the western end of the canal of Tancarville, for the construction of quays, &c., whereon to discharge cotton and other merchandise.

In addition to the steam and hydraulic cranes mentioned in my report last year, 4 more, with a lifting power of $1\frac{1}{2}$ tons each, to be worked by steam or electricity, have been placed on the north side of the "Bassin Vauban."

The total amount voted by the Chamber of Commerce for various improvements during the last 3 years has been 2,325,000 fr. (93,000*l.*), notwithstanding which it calculates on receiving under the new scale of dock dues, which came in force on September 1 last, 500,000 fr. (20,000*l.*) per year less.

The
Tancarville
Canal.

The traffic by the Tancarville Canal, which fell from 440,330 tons in 1891 to 373,096 tons in 1892, rose again last year to 445,978 tons. No work of any importance was undertaken on the canal in 1893.

Rules for
vessels
anchoring in
the roadstead,
or bound up
or down the
River Seine.

In consequence of several collisions which occurred in the roadstead of Havre, the Maritime Préfet of Cherbourg issued on September 23, 1893, a set of rules laying down the limits within which vessels are to anchor in the roadstead, and also the course to be steered by steamers bound up or down the River Seine. These instructions are to be communicated by the pilot to the captain of the vessel he boards, and should the latter not conform thereto he will render himself liable to the penalty prescribed by the corresponding article of the Code Penal.

Light on Cape
Antifer.

The new light and fog horn on Cape Antifer have not yet been completed.

Law cases of
interest to
British
shipowners.

Two judgments of considerable importance to shipping were delivered last year by the Havre tribunals. In the first case, which was tried (on appeal from the decision given in favour of the ship by the Juge de Paix) by the civil tribunal, the captain of the British steamer, "Duke of York," was prosecuted by the authorities of customs for not having stated in the manifest that he had 3,920 sacks filled with grain as part of his cargo of wheat. The captain pleaded that he had declared a cargo of wheat in bulk, and 4,113 wheat sacks, and that thus he had declared the whole of the cargo on board his ship, and that it was only in compliance with British law on the storage of grain that he had filled 3,920 of the 4,113 empty sacks with wheat. The Court decided that the captain was in fault in having mentioned in the manifest grain sacks, instead of sacks filled with wheat, and annulled the decision of the lower tribunal, condemning the captain to pay the value of the merchandise, viz., 49,392 fr., a fine of 1,000 fr., and the costs of the suit. Content with having established the principle for which they contended, the customs authorities afterwards consented to forego claiming the value of the wheat, reduced the fine, and only exacted payment of the duty on the empty sacks, and of the costs of the suit.

In the other case the owners of the ss. "Oceanic" brought an action against the consignees of the cargo of cotton, claiming a sum of 5,786 fr. for the expense they had been put to in stowing,

piling, covering, watching, and insuring against fire the bales, owing to the encumbered state of the quay, and the negligence of the latter in clearing the goods when weighed, plus 4,191 fr. for 3 days' demurrage, and 1,600 fr. for damages, &c. The Tribunal of Commerce decided that the claim for expenses incurred was, minus the amount paid for fire insurance, a valid one according to the terms of the bill of lading, and that the steamer was entitled to claim 3 days' demurrage, but that, inasmuch as the bill of lading is silent on this question, while providing for the fault of not taking delivery, &c., the demand of payment for the demurrage must be refused, as also that for damages, &c.

The health of the town of Havre having been satisfactory last year, the movement of the population, 116,369, was more favourable than in 1892, the deaths having been 3,662 (282 less), the births 3,799 (145 more), and the marriages 1,148 (25 more). There were 71 divorces, an increase of 4. The infant mortality continues high, 802 children having died under 1 year of age, and 482 between 1 and 5 years. The death-rate per 1,000 at the different ports in the district of the Consulate-General in 1893 was, Havre, 30·6; Caen, 28; Trouville-Deauville, 26; Honfleur, 25·5; Fécamp, 25; and Dieppe, 30·7.

Statistics of the population, &c., of Havre.

14 vessels, of 6,861 tons, were launched last year, and 9, of 5,395 tons, were commenced. M. A. Normand keeps up the great reputation he has gained for the speed, &c., of the torpedo-boats built by him both for the French and Russian Governments.

Death rate in ports of the district of the Consulate-General.

In other industries the only change to be noted was the starting of a new rice mill.

Shipbuilding.

No strikes of any consequence occurred among the labouring classes last year, but considerable distress existed among them, owing to the general slackness and depression of trade.

Strikes.

Nor was 1893 at all a favourable year for the agricultural interest, for, with the exception of apples and potatoes, they had no crop which could be called a good one, while, owing to the prolonged drought which burnt up the pastures, and made hay and forage rise to an impossible price, they were frequently obliged to sell their cattle and horses at a ruinous sacrifice. Wheat turned out better than was expected, although it could not be called a good crop, but colza (rape) was a very poor one.

Agriculture.

6,921,089 hectares (17,094,870 acres) were sown to wheat last year, and are estimated to have produced 97,424,870 hectolitres (33,502,011 quarters), or an average of about 15·65 bushels per acre for the whole country. The return per acre varies greatly in the different districts. Thus in the north, 2,904,670 acres averaged about 20·15 bushels; in the north-west, 1,862,083 acres returned 17·15 bushels; in the west, 2,858,037 acres gave 14·40 bushels; and in the south-west, 1,180,660 acres produced 13·55 bushels per acre. It is necessary to bear this in mind when calculating the effect of the protective duty on wheat. During the course of the debate in the Chamber of Deputies, when the duty of 5 fr. (8s. 9d. per quarter) was raised to 7 fr. (12s. 3d.) certain figures were brought forward by M. Siegfried, one of the Deputies for Havre, which showed how little benefit the small

Details of the wheat crop in France in 1893.

Increase of the duty on wheat.

Who will
benefit
thereby.

cultivator would get from the increased duty. It appears that the number of those whose holdings are under $2\frac{1}{2}$ acres is 2.2 per cent. of the total; from $2\frac{1}{2}$ to $12\frac{1}{2}$ acres, 11.3 per cent.; $12\frac{1}{2}$ to 25 acres, 11.6 per cent.; 25 to 100 acres, 29.9 per cent.; over 100 acres, 45 per cent. The consumption of wheat in France is estimated at 90,000,000 quintals; a duty of 7 fr. therefore represents in its bearing on the price a total amount of 630,000,000 fr. (25,160,000*L.*). It will be seen from the above figures how small will be the amount received, under the most favourable circumstances, by the little tenant farmer or proprietor. Those cultivating under $2\frac{1}{2}$ acres, the number of whose holdings is 2,157,667, will receive about 7 fr. 15 c.; from $2\frac{1}{2}$ to $12\frac{1}{2}$ acres—1,865,878 holdings—about 37 fr. 65 c.; $12\frac{1}{2}$ to 25 acres—769,152 holdings—about 95 fr.; 25 to 100 acres—727,222 holdings—about 258 fr.; and over 100 acres, 142,088 farms, about 1,995 fr. for each farm cultivated by them. The consumption of bread in France is put at 600 grammes per day. Taking the duty at 7 fr. (M. Siegfried's was based on 8 fr., the rate first proposed, but rejected by the Government), the annual portion of it will, if the duty has the effect on prices which its supporters hope for, amount to 15 fr. 75 c., or, for a family consisting of father, mother, and four children, to 94 fr. 50 c. (3*l.* 15*s.* 7*d.*). It, therefore, clearly follows from the foregoing figures that the increased duty on wheat will be to the advantage, if any, of the larger farmers and proprietors, and that it will not benefit the small cultivators, while adding to the burdens of the consumers. The price of wheat and bread will, under its effects, either rise to the full extent the Protectionist party desire, and thereby oblige the working-men to demand higher wages, whereby the manufacturer will find it still more difficult to fight against his competitors in foreign markets, or it will not have the result expected from it, will disappoint the hopes raised, and have disorganised commerce, and inflicted injury on the varied interests connected with the trade at the large French ports, to no good purpose whatever.

Probable
results to the
consumer.

The price of
wheat in
January and
December,
1893, &c.

The price of wheat in January, 1893, with the duty of 5 fr. (8*s.* 9*d.* a quarter) was 21 fr. 69 c. per 100 kilos., or about 48 fr. 23 c. (37*s.* 8*d.* per quarter). In December, 1893, at the same duty, the price was 20 fr. 60 c. (35*s.* 9*d.*). To-day, with the duty at 7 fr. (12*s.* 3*d.*), the price, under pressure of sales, owing to the large importation of wheat before the change of the duty, is 20 fr. 5 c. (35*s.* the quarter).

Price of
bread.

The price of household bread in January, 1893, was for 3 kilos. (6 lbs. $9\frac{3}{4}$ ozs.) 1 fr. 5 c.; in December last, 95 c.

The octroi
dues.

The octroi dues, or municipal taxes, on articles of consumption, fuel, forage, &c., produced last year 3,996,127 fr. (159,845*L.*), or 1*l.* 7*s.* 5*d.* per head of the population. There is a wide-spread movement in France in favour of doing away with these dues, which are thought to press hardly on the poorer classes of the community. The municipality of Havre are among those who are in favour of their abolition, but the difficulty up to the present time has been the choice of other taxes to take their place.

Movement
for their
abolition.

CAEN.

Mr. Vice-Consul Lethbridge reports as follows:—

General Remarks.

There is little of general interest to note since the report of my predecessor for 1892. But two events of local interest have occurred in 1893, the most important one being the opening of a regular line of steamers between Caen and Newhaven by the London, Brighton, and South Coast Railway Company on February 1. General remarks.

It has been for many years the great desire of the citizens generally and the merchants in particular to see their port connected by a regular line with the United Kingdom, so that when this line was opened it met with the most cordial reception by all, and the Mayor and Municipal Council and the Chamber of Commerce met the first boat with an official welcome. Some 8 or 9 years ago the merchants of Caen started a service from Caen direct to London, but it could not compete with the many channel services which could ensure greater dispatch to the agricultural and dairy produce, so it ceased to exist after losing about 4,000% in six months.

This new line to Newhaven opens under much more favourable auspices, profiting as it does by the new exportation tariffs on the Western of France Railway, which enable them to take full advantage of the closer proximity of Caen to the most important exporting centres for dairy and agricultural produce of Alençon, Le Mans, Angers, and the departments of the Orne, Sarthe, &c., generally. The Brighton Company, it is reported, are building new boats for the line of great speed, fitted with the electric light and all the latest improvements for the accommodation of passengers, and expects to have a large passenger traffic at least in the summer months, giving, as this line does, easy access to the many charming seaside resorts which are to be found on the coast between Trouville and Isigny. At all of these little watering places the bathing is excellent and living extremely cheap when compared with the fashionable "plages" of Trouville, Dieppe, &c., facts which are quite appreciated by the quieter portion of the French people, but are not sufficiently known at present by the English.

The other event to which I alluded above was the opening in July of the narrow gauge steam tramway from Caen to Ouistreham, which, following the left bank of the canal, passing the whole distance through a fine avenue of trees, connects Caen with the same tramway which runs along the sea coast from Lucq on the west to Dives, Cabourg on the east, a distance of some 15 miles, and going through 10 little watering places of a most picturesque appearance.

British
residents.

For more than half a century before 1870 there had always been a very numerous British colony in Caen, but increased cost of living since the Franco-German war has gradually reduced the number to its present insignificant proportions. But I think that if the great educational advantages were better known there are many English people with large families who would find it a very charming and advantageous residence for a few years. Caen is a very highly-considered university town, and possesses an admirably situated lycée, which has a reputation for good education unequalled by any other in the north-west of France, and where a day-boy can have a most thorough education for 6*l.* to 8*l.* a year. For a like amount girls can follow classes which are held by all the best professors to be found at the university.

Caen
University.

Caen town.

The town itself contains many most interesting historical monuments, and is surrounded by numberless promenades and avenues of grand old trees. Whilst living is, of course, not so cheap as in England, it is very much cheaper than in most towns in this part of France even of smaller size.

Shipping and
navigation.

The accompanying table (Annex A) of shipping shows an increase of 137 vessels and 23,496 tons, which is entirely accounted for by the steamers of the Newhaven line.

Imports.

Imports.
Coals.

Annex B shows a slight falling-off of imports. The coal strike in England is accountable for a diminution of 15,000 tons in that article, and there were about 10,000 tons less wheat brought in, whilst, on the other hand, 6,000 tons more timber were imported.

Timber.

Exports.

Exports.
Iron ore.

Dairy
produce.

Oilcake.

Barley.

The exports show a total increase of 20,920 tons. Iron ore exports amounted to 74,614 tons, being an increase of 9,363 tons over the previous year, the rest of the increase being made up of the agricultural and dairy produce taken to the United Kingdom by the Newhaven line. Against this there was a falling-off in the export of about 1,800 tons of oilcake and 3,468 tons of barley.

Other ports
of the
district.

The ports of Courseulles and Isigny show an increase of 7 and 12 vessels and 1,628 and 1,180 tons respectively, whilst Ouistreham and Port-en-Bessin show a decrease of 1 and 6 vessels and 183 and 1,327 tons respectively.

Public Works.

Public works.

The deepening and widening of the canal and port of Ouistreham (spoken of in last year's report) so that vessels of greater draught may come to Caen have not yet been commenced, but good progress has been made with the preliminary

formalities, and it is probable the year 1894 will see a beginning of this important undertaking. The present lock at Ouistreham will not be interfered with till the new one is available, so that the navigation of the canal will not be interrupted.

The National Electric Light Company of Paris have obtained permission to lay their cables under the streets of Caen for the purpose of providing the electric light to shops and houses. The town authorities are unable to make a contract for the public lighting of the town, as they have a contract with 30 years longer to run with the European Gas Company of London. Electric light.

The National Electric Light Company have already built a large factory here, and, it is to be noted, are getting their cables and machinery direct from England by the new line. They expect to begin work early in the next year. I have on good authority that they have proposed to the Chamber of Commerce to light the canal throughout on condition of being allowed to levy a certain toll on all vessels navigating the canal at night.

Agriculture.

The prolonged drought of last spring and summer proved ruinous to the crops of all descriptions. It was a common sight in June and July to see horses and cattle turned in to eat up the thin and stunted crops in a great number of farms. The harvest, consequently, was of an inferiority both of quantity and quality happily unknown for many years, wheat alone turning out a little better than was expected. The actual figures given as the outcome of the harvest in Calvados are as follows:—Wheat, 1,343,000 quintals; colza, 211,115 quintals; oats, 57,350 quintals; barley, 21,800 quintals. Naturally hay and all forage crops suffered in a greater degree even, and the failure of all kinds of forage was such that in the autumn the markets were glutted with horses and cattle, which the farmers saw no prospect of being able to feed during the approaching winter. Equally naturally, they realised prices that can only be described as being “given away.” Agriculture.
Grain.
Forage.

There was, however, one redeeming feature in the much-depressed farmers lot, and that was the immense crop of apples, which, in spite of the attacks of all those parasites spoken of in last year's report, and which were particularly favoured by the weather, was the largest crop for many years, resulting in such an abundance of cider that casks to put it into rose to a premium, and the price of cider came down to lower than had been known for years. Apples.

Miscellaneous.

The movement of the population of Caen (45,201) during the past year shows an increase of 52 births and a decrease of 66 deaths over the preceding year. The births were 923, against (1705) Statistics of the population.
B 2

871, and deaths 1,256, against 1,322 in 1892. There were 297 marriages, or 12 less, and 13 divorces, or 3 more than the year before.

Epidemics. Caen again escaped any visitation from cholera, but diphtheria and small-pox towards the end of the year assumed an epidemic form, although it never attained any considerable proportions. Influenza also made its appearance, but was of a distinctly more benignant character than during its preceding visitations.

Foot-and-mouth disease (cattle). Throughout the year foot-and-mouth disease kept up a desultory attack on cattle in this district, but was kept within bounds by the energetic supervision of the authorities and at no time assumed alarming proportions. By the end of the year it was practically extinct.

Wrecks. We have to deplore the wreck of two British vessels off this coast, though fortunately entailing no loss of life.

On November 20, during the very fierce gale from the N.N.E. which raged at that time, a small brigantine, called the "Elizabeth Kelly," bound from Treport to Dublin with superphosphates, drove on the reef of rocks called the Essarts, which lie off Langrune. As soon as they were seen from the shore the fishermen of that place put off in the teeth of the gale and a fearfully broken sea and rescued the crew of six hands all told, and brought them safely to shore and treated them most kindly. The master, who was also the owner, stayed by the wreck and sold off the salvage before he returned to England.

On December 2 the steamship "Jane Clark," of Glasgow, 13 hands all told, struck on this same reef at 1 A.M. during a gale from north-east, and immediately the seas broke over her, and the crew had only time to get into their own lifeboat and lay off the wreck under shelter of it, shelter which was not sufficient to prevent the water continually coming into the boat, so that they were in constant danger of sinking. It was one of the most bitter nights of the winter, and the sufferings of the crew were very great. At daybreak they were observed from the shore, and one of the boats that saved the crew of the brigantine again put off, and with arduous labour against the gale and wild sea took off half the crew, and the rest were then able to come ashore in their own boat after being for 10 hours exposed to instant death. This casualty does not appear to have been caused by the bad weather but by grossly negligent navigation.

The steamer, which had on board a cargo of about 1,000 tons of coals, bound for Caen, was, after great expense and labour, got off and taken to the United Kingdom, where she was condemned.

This shoal of rocks has been the scene of many shipwrecks, lying as it does about 4 miles off the land; in fact, during the same gale which wrecked the brigantine on November 20 a large Dutch steamer got caught on it, but, fortunately, was floated off after great efforts.

**Annex A.—RETURN of all Shipping Entered at the Port of
Caen during the Year 1893.**

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	15	1,244	289	88,504	} 461	114,996
Newhaven ...	...	...	157	25,248		
Packets ...	...	...	86	29,581		
French ...	...	...	8	2,907	8	29,581
German ...	...	...	...	...	...	2,907
Swedish and Norwegian ...	6	889	5	3,118	11	4,007
Russian ...	3	879	2	824	5	1,703
Other countries ...	11	3,490	40	20,259	51	23,749
Total ...	35	6,502	587	170,441	622	176,943
for the year ...	...	...	...	...	485	153,447
Preceding ...	...	...	...	...	729	45,290
French coasters ...	...	...	...	...	...	...

**Annex B.—RETURN of Principal Articles of Import to Caen
during the Years 1893-92.**

Articles.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Coal	270,933	285,904
Timber	28,920	22,731
Wheat	4,192	14,020
Pitch	4,468	..
Turf	3,853	..
Coffee	1,139	..
Nitrate of soda	1,100	..
Cement	658	..
Wood-pulp	540	..
Ice	365	..
Wine	337	..
Bran	310	..
Rags	217	..
Seed	68	..
Other goods	2,188	..
Total	319,288	322,655

RETURN of Principal Articles of Export from Caen during the
Years 1893-92.

Articles.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Iron ore	74,610	65,251
Colza (cake)	3,403	5,262
Eggs	3,749	..
Butter	2,155	..
Sugar	2,690	..
Fruits	2,218	..
Caen stone	1,658	1,625
Barley	1,268	4,754
Poultry	920	..
Seed	277	..
Rags	198	..
Cheese	139	..
Coal tar	510	..
Other goods	4,004	..
Totals	97,812	76,892

RETURN of British Vessels Entered at the Undermentioned
Ports of the Vice-Consular District during the Years
1893-92.

Ports.	1893.		1892.		Cargo.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
Ouistreham	6	803	5	620	} Coal.
Courneilles	16	2,528	8	900	
Port-en-Bessin	8	1,427	14	2,700	
Isigny	16	1,730	4	550	

NOTE.—The same number of vessels cleared at the port of Caen and the outlying ports of the Vice-Consular District during the year 1893.

HONFLEUR.

Mr. Vice-Consul Leeson reports as follows :—

Shipping and Navigation.

Shipping and
navigation.

Comparing the return of all shipping entered and cleared at the Port of Honfleur in the year 1893 with that of 1892 there appears a decrease of 60 vessels, and between 3,000 and 4,000 tons.

This decrease may be attributed to the withdrawal of one of the two lines of small steamers that for many years past had been trading between Honfleur and the United Kingdom.

The condition of the port continues to be carefully attended Condition of
to in every way, and the depth of water at the entrance and in the trade.
the basins maintained.

The dredging of the basins has been carried on continuously Dredging.
for months past, and the contents of several large barges are sent
out by each tide, but not carried far enough beyond the precincts
of the port, being emptied on the near bank to the north of the
entrance. It would be an advantage if such a vast quantity of
mud and gravel could be carried further down towards the sea,
on account of the already too narrow channels and approaches
to the port, and with a rapid current sweeping it backwards and
forwards, but the port of Havre in her more extensive and
important interests, says no, not to put too fine a point upon it,
thus hemming in her smaller neighbour, who thereby continues
to prosecute the labour of Sisyphus; though were the relative
positions of the ports to be reversed, doubtless the latter would
adopt precisely a similar course. However, the swift little
steamer "Eclaireur," belonging to the Chamber of Commerce at
Rouen, constantly patrols the lower portion of the Seine, taking
soundings, and the bearings of the alterations of the channels,
through the shiftings of the sand and mud banks.

Freights have been about the same as in 1892, from the Freights.
south-west ports averaging from 4*s.* 9*d.* to 6*s.* 6*d.*, and somewhat
lower from Newcastle and Sunderland.

Imports.

There has been a total decrease of 51,000 tons in the imports Coal.
for 1893 from the year 1892, that of coal being the largest item, Price of coal.
viz., 78,400 tons. The prices of coal at Honfleur are exorbitant,
averaging over 2*l.* per ton, an undue profit, taking into con-
sideration the cost at the pit-mouth about 7*s.* 6*d.*, and freights
being low. Compensating in some measure for this large decrease
in the imports, there has been an increase of 27,500 tons of
timber. I have to note an increase in the employment of foreign
steamers (Swedish, Norwegian, Danish, and German) in this
trade. Despite the fact, the number of British steamers engaged
in this branch of trade in 1893 has exceeded that of the year
1892.

Exports.

It is in the exports from this port that the trade of the past
year has suffered, in a great portion through exceptional causes
and those quite outside of ordinary circumstances. There has
been a serious diminution in the export of all descriptions of farm
and dairy produce, resulting partly from the diversion of the
trade by the withdrawal of the line of small steamers above-
mentioned, and also in consequence of the unprecedented drought
of last spring and summer, commencing in March and continuing
(1705)

until August without intermission, converting promising pastures into arid dusty patches, and the hay fields into parched and scanty growth of herbage, grown to maturity before the time, and seriously affecting the other crops, with one exception, fruit, which was most abundant, and of very good quality.

Fruit. The export of fruit exceeded that of the year 1892 by over 3,000 tons.

Eggs, butter, poultry, and grain. There has been also a serious diminution in the exports of eggs of over 3,000 tons, likewise a decrease of 2,900 tons of butter, of over 600 tons of poultry, and 800 tons of grain of different descriptions.

Industries.

Pastoral industries.

The industries of the town of Honfleur are mostly confined to fishing. Those of the district being mainly pastoral are, on that account, more easily affected by the clemency or otherwise of the seasons, and losses amongst the farming and grazing communities are widespread when an exceptional circumstance, such as the drought of the late summer, occurs.

The French Government alive to the losses of the farmers and producers, adopted urgently a project authorising the railway companies to reduce by 25 per cent. the cost of the carriage of alimentary produce, including hay and forage for cattle and horses. To which project the several railways unanimously gave their adhesion. The Minister of Public Works had also addressed a circular to the prefects authorising permission for the pasturage of cattle and sheep on the slopes and strips of grass land lying along the national roads.

Manufactures of butter and cheese.

The butter and cheese industry are extensively carried on in this district; and I may add the practice of adulterating the former largely with margarine or other compounds is almost generally adopted, and though against the law, without let or hindrance—in fact, without any attempt at concealment, almost all the butter sold in the town of Honfleur is largely adulterated. Occasionally the authorities stir themselves in the matter and justice overtakes the offender, as a butter merchant at Lisieux, in this district, having (as it was stated) an extensive trade with England, and who had already been condemned in the year 1888 to four months imprisonment, and a fine of 3,000 fr. (or 120*l.*) for that offence, was last summer, for a repetition of the same, sentenced this time to eight months imprisonment, and a fine of 5,000 fr., with the addition of the confiscation of 4,150 kilos. or considerably over 8,300 lbs. of his stock in hand. The judgments against him to be published on 45 occasions in the newspapers, and he to pay all expenses.

One other butter dealer was venturesome enough to carry his sentence for a similar offence to the Court of Appeal at Caen, which not only confirmed the sentence, but increased the punishment, and directed that a copy of the judgment should likewise

be inserted on 30 occasions in the newspaper, affixed to the door of the Mairie at Mezidon, as also at his own house, warehouse, and in the market place of the town.

If such vigorous measures were more often and universally adopted this practice would be gradually decreased, and the trade, home and foreign, would be materially benefited.

The dynamite factory of Ablon, within 2 or 3 miles of the town of Honfleur, and which employs from 50 to 60 men, was in August last the scene of a serious explosion, resulting in the total destruction of the factory and loss of several lives. The catastrophe was caused through carelessness on the part of the workmen engaged in the blending of the nitric-acid and glycerine, a most delicate operation, and one requiring the utmost caution.

Manufactory of dynamite.

Within the last week the reconstruction of the establishment has been completed; during the past year 502 tons were shipped, of which 53 tons were for the United Kingdom, a considerable quantity having been exported to the Cape, Transvaal, and Port Elizabeth. Precautionary measures have lately been adopted for shipping dynamite at the port of Honfleur, at the furthest extremity of the inner basins, and as far removed from the outer basins, shipping, and quays as possible, and immediately the last case of the explosive has been shipped the vessel is to cast-off, and proceed to sea with as little delay as possible.

Export of dynamite to the United Kingdom, Transvaal, and Port Elizabeth.

There have been no public works of any importance during the year.

Public works.

The crops were generally inferior to those of the year 1892. Wheat suffered least, but the yield was less than the preceding year on account of the drought.

Crops. Wheat.

The hay crop was a most scanty one from the same cause, and was scarce and the price was doubled. The later rains, however, brought on an aftergrowth of grass that was of much benefit to the stock, sadly fallen off by scarcity of food.

Hay crop.

The apple crop was abundant, though insects and parasites did great execution, causing much of the fruit to fall-off early in the season.

Apple crop.

One of the smaller banks of long standing in Honfleur, Messrs. Blotiere and Goupil, has lately suspended payment to the amount of 978,000 fr. or nearly 40,000*l.*, causing great distress amongst the smaller trades people and farmers, whose savings had been deposited there.

Failure of bank and paper factory.

A paper manufactory in the town that had business connections with this bank has also lately failed, throwing 60 workpeople out of employment, adding to the distress amongst the labouring population of Honfleur.

The health of the town and district has been fairly good during the year, and no epidemic of any consequence has occurred. This immunity from disease results in a great degree from the abundant and never failing supply of pure water brought from a distance, always flowing from open fountains, and circulating through the town, cleansing the channels of the narrow filthy streets, and dilapidated old houses in the older part of the town, particularly where the fishing population, whose habits are not

Health of the town and district water supply.

of the most cleanly description, congregate, as nearer to the outer basins.

The population of Honfleur at the present time is 9,588; the births, deaths, births during the year have been 255, deaths 234, marriages 67.

Population,
births, deaths,
and
marriages.

Annex A.—RETURN of all Shipping Entered at the Port of Honfleur during the Year 1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	12	1,317	189	70,588	201	71,906
" South- ampton boats ...	...	...	219	40,844	219	40,844
French	1	873	...	...	1	873
" coasters ...	...	...	...	...	245	11,025
Swedish and Nor- wegian*	...	...	...	...	45	9,830
Russian	17	7,688	...	...	17	7,688
German*	...	...	...	...	7	3,250
Other flags* ...	...	...	...	...	3	1,897
Total	30	9,578	408	111,432	738	141,312
" for the year preceding ...	...	...	...	...	798	150,782

* Sailing and steam.

NOTE.—The same number of vessels cleared at the port of Honfleur during the year 1893.

Annex A.—RETURN of all Shipping Entered at the Port of Honfleur during the Year 1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	15	1,590	134	61,191	149	62,781
" South- ampton steamers ...	...	...	219	40,844	219	40,844
French	1	873	...	...	1	873
" coasters ...	...	...	...	...	245	11,025
Swedish and Nor- wegian*	...	...	...	...	45	9,830
Russian	17	7,688	...	...	17	7,688
German*	...	...	...	...	7	3,250
Other flags* ...	...	...	...	...	3	1,897
Total	33	10,151	353	102,025	686	138,188
" for the year preceding ...	...	...	...	...	798	150,782

* Sailing and steam.

NOTE.—The same number of vessels cleared during the year 1893.

Annex B.—RETURN of Principal Articles of Import to Honfleur during the Years 1892–93.

Articles.	Quantity.	
	1892.	1893.
	Tons.	Tons.
Timber	78,136	105,654
Coal	146,842	67,927
Iron	279	347
Cement	902	726
Total	225,659	174,654

RETURN of Principal Articles of Export from Honfleur during the Years 1892–93.

Articles.	Quantity.	
	1892.	1893.
	Tons.	Tons.
Fruit	6,886	10,137
Eggs	5,460	2,107
Butter	3,836	892
Cheese	200	75
Grain	900	94
Poultry	1,409	734
Tota	18,691	14,039

TROUVILLE-DEAUVILLE.

Mr. Vice-Consul O'Niell reports as follows:—

Shipping and Navigation.

On referring to Annex A, it will be noticed that we have a decrease of 1,847 tons on the registered tonnage of last year.

Nearly all the coal steamers arriving at the port are unloaded within 48 hours, and in many cases in half that time.

Trade and Commerce.

The table of imports shows a diminution of 4,332 tons on last year's total, coal having decreased by 6,590 tons; but, on the other hand, we have a small increase of 1,592 tons of timber. Imports.

Population and Industry.

Population.
Industry.

The population of Trouville-Deauville is increasing slowly.

The different industries are about the same as in my last reports, with the exception of La Société Elmore Française, at Dives-sur-mer, which establishment was constructed and started about 3 years ago for the fabrication of copper wires, &c.; and which was in liquidation in the course of last year, but is now in full working order.

The port is now provided with cranes, which facilitates the unloading and the quick dispatch of vessels.

Public Works.

Trouville
Pier.

The Trouville pier, which has now been in working order for the last 2 years, has in fact greatly facilitated the traffic to Trouville. The boats of La Compagnie Leprince, of Havre, having conveyed during the period of the renowned Deauville races as many as 10,000 persons daily.

General Remarks.

Sanitary.

The health of Trouville-Deauville and the district has been satisfactory.

Agriculture.

The crops, on the whole, were very poor and inferior, especially hay and straw, occasioned by the prevailing drought during the spring and summer, and consequently sold at exorbitant prices.

Cattle.

The apple and pear crops were satisfactory, and prices low.

We have had no further outbreak of any epidemic amongst cattle.

Annex A.—RETURN of all Shipping at the Port of Trouville-Deauville during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	546	102	34,752	106	35,298
French	2	422	...	...	2	422
Norwegian	8	1,855	1	320	9	2,175
Swedish	1	508	...	...	1	508
Russian	10	3,145	...	...	10	3,145
German	...	...	11	4,947	11	4,947
Danish	4	617	...	...	4	617
Total	29	7,153	114	38,019	143	45,172
.. for the year preceding	...	...	...	...	146	49,019

HAVRE.

27

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	4	546	99	33,859	103	34,405
French ...	...	...	...	...	...	...
Norwegian ...	8	1,855	1	320	9	2,175
Swedish ...	1	568	...	...	1	568
Russian ...	10	3,145	...	...	10	3,145
German ...	...	...	11	4,947	11	4,947
Danish ...	4	617	...	...	4	617
Total ...	27	6,731	111	39,126	138	45,857
„ for the year preceding ...	...	...	...	...	141	48,432

Annex B.—Return of Principal Articles of Import to Trouville during the Years 1893–92.

Articles.					Quantity.	
					1893.	1892.
					Tons.	Tons.
Coal	..	..	..	..	69,175	75,765
Timber	..	..	..	..	14,093	12,501
Ice	..	..	..	..	945	1,182
Cement	..	..	..	..	1,162	428
Pitch	..	..	..	..	934	765
Total	..	..	..	..	86,309	90,641

STATISTICS for 1893.

Description.						Number.
Births	..	..	..	..	..	253
Marriages	..	..	..	..	..	75
Divorces	..	..	..	..	..	3
Deaths	..	..	..	..	..	223

Four British sailing vessels, with a total of 336 register tons, and two Danish, with a total of 183 register tons, entered the port of Dives S/Mer during the year 1893.

FÉCAMP.

Mr. Vice-Consul Handisyde reports as follows:—

The navigation in 1893 shows a new decrease in the number of ships entered at the port of Fécamp, especially caused by the strikes in the ports of export for coals.

Only two fishing-boats were constructed in 1893. The Newfoundland fishery gave a good result—about 20,000*l.* more than the last campaign.

The mackerel fishery gave a good average on the previous years.

The herring fishery gave very good results—nearly 22,000*l.* more than last year.

The three fisheries gave altogether a product of 202,200*l.*

Trade and Commerce.

The strikes which took place in England have been the only cause of the decrease in the import of coals.

Importation of timber has increased in a small proportion, and especially in the pitchpine branch.

The export of oilcakes showed a decrease of 753 tons, caused by the large demand of this article in the north of France.

Population and Industry.

A small increase is to be noted in the population of Fécamp.

No epidemical illness has visited us.

The births were 91 more than the deaths.

There is very little change in our local industries. The establishment of the Liqueur de la Benedictine, and a large saw-mill, which were both destroyed by fire, are completely rebuilt.

The saw-mills are in a good situation, and the oil-mills work satisfactorily.

Spinning has given a better result ; the mills have increased their superficial buildings, and been fitted with new and improved machinery.

Public Works.

400 feet of wooden quays have been established in the new tidal dock. The construction of 600 feet of new quays in masonry will be soon put up to tender, and also a large grid-iron.

The new railway line from Havre to Dieppe, viâ Fécamp, will be commenced during the year 1894. The line from Fécamp to Etretat is much advanced, and will be opened probably in next June.

RETURN of all Shipping at the Port of Fécamp during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	5	1,276	49	14,715	54	15,991
French	10	1,377	3	1,224	13	2,601
Norwegian	13	7,697	1	375	14	8,072
Swedish	3	1,284	...	...	3	1,284
Danish	9	1,325	1	296	10	1,621
Russian	2	443	...	...	1	443
German	...	...	1	367	1	367
Total	41	13,402	55	16,977	96	30,379

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	5	1,276	49	14,715	54	15,991
French	10	1,377	3	1,224	13	2,601
Norwegian	12	6,547	1	375	13	6,922
Swedish	3	1,284	...	...	3	1,284
Danish	9	1,325	1	296	10	1,621
Russian	1	443	...	...	1	443
German	...	...	1	367	1	367
Total	40	12,252	55	16,977	95	29,229

RETURN of Principal Articles of Export and Import to and from Fécamp during the Years 1893-92.

EXPORTS.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Oilcakes	940	5,640	1,693	10,160
Flint	..	..	970	194
Chalk	120	15	..	..
Clay	4,670	560	375	40
Salt	8,284	3,315	7,492	7,492
Total	14,014	9,530	10,530	17,886

IMPORTS

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coals	27,556	27,000	33,000	31,680
Cement	84	200	146	409
Timber	16,808	39,580	11,021	35,267
Hemp	22	88	15	48
Salt	4,220	3,376	4,260	3,408
Rapeseed and arachides	1,642	14,778	2,781	29,474
Ice	810	405	746	448
Tar	188	940	96	464
Sundries	..	..	38	60
Wheat	563	5,630	..	..
Total	51,893	91,997	52,108	101,258

TABLE showing the Value of all Articles Exported from and Imported to Fécamp during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
England	575	234	27,200	32,613
Denmark	5,640	10,160	..	..
Germany	..	..	10,636	10,022
Sweden and Norway ..	..	..	12,769	15,897
Russia	..	..	400	250
America	..	..	33,886	19,568
Spain	..	..	1,313	..
Algeria	..	..	..	3,408
Africa	..	..	4,230	19,500
Newfoundland	3,315	7,492	..	..
Other countries	..	..	2,063	..
Total	9,530	17,886	91,997	101,258

STATISTICS of the Population.

Description.				Number.	
				Last census	..
Births	..	..	..	1893	418
Deaths	..	..	..	1893	327
Marriages	..	..	..	1893	99
Divorces	..	..	..	1893	3

DIEPPE.

Mr. Vice-Consul Lee-Jortin reports as follows:—

Shipping and Navigation.

During the past year depression has continued to characterise trade in general, although, as a matter of fact, the tonnage of merchandise imported from Great Britain by the two large carrying companies connected with this port has slightly increased. The import also of coal was in excess of that of 1892 by 22,000 tons, but that of iron diminished. The increase in the import of petroleum from America is very marked, this illuminant at last superseding in a great degree the use of colza oil in France.

Depression
in trade
continuing.

Particulars of the principal articles of import at this and the ports of Tréport and Eu in this Vice-Consular district will be found in Annex B.

On May 1 the Newhaven and Dieppe passenger steamers recommenced their double service of day and night boats, but with the difference of former years that the day service was no longer to be suspended in the autumn; but it offers to the travelling public a day and night service all the year round at fixed hours for starting. The second new screw passenger steamer, built at Havre, called the "Tamise," was put on this line during the summer. The "Tamise" and the "Seine" (both French-built boats) are 82 metres long. The net tonnage of the steamship "Seine" is 106·09 tons (French measurement), horse-power 4,000, speed 21 knots. The net tonnage of the steamship "Tamise" is 150·33 tons, horse-power 4,500, speed 22 knots. The new screw ship building on the Clyde will be about the same length as the French ships, but with a little more beam, and is intended to accomplish the transit from Newhaven to Dieppe in 3 hours 15 minutes, and is to be put on the service in May. The first class accommodation will be put in the forepart of the vessel, and the second class aft, in order to lessen in the first class the tremulous motion caused by the screw. The Dieppe Chamber of Commerce is very desirous that the Conseil d'Arrondissement should use their utmost influence with the directors of the Western of France Railway Company to induce them to lose no time in constructing a double line from Dieppe to Paris, by Pontoise, so as to run rapid express trains over this shorter route, and thus lessen by at least an hour the time requisite to reach Paris from Dieppe. The total number of passengers using this route has increased to 111,681 in 1893.

Establish-
ment of a day
and night
service all
the year
round
between
Newhaven
and Dieppe.

Trade and Commerce.

I have once more to return to the subject of coal shortages at Dieppe, but this time I have the satisfaction of reporting that as

Results of the
visit of
English

(1705)

C

delegates to
Dieppe
relative to
short delivery
of coal.

a consequence of the visit I spoke of in 1892 of delegates from the Dieppe Chamber of Commerce to Cardiff and Swansea, and of the return visit of the English delegates from Cardiff and Swansea to Dieppe on December 6, 1893, an understanding has been arrived at which it is hoped will smooth all difficulties, and result in a more satisfactory system of weighing coal cargoes.

A very clear statement of the whole question has been drawn up by three of the English delegates, which, as it is brief and concise, I will here quote:—

Report of the Delegates.

Report of the
delegates.

“At 9 A.M. on December 7, 1893, carriages came to the hotel and conveyed the delegates from the various Chambers of Commerce to the berths where the discharging and weighing of coal cargoes are carried on. We carefully inspected the discharging, which process showed nothing out of the common; the tubs were filled in the holds, and discharged into trucks and carts, a slight loss in each case occurring owing to the dust that blew away.

“Taking the carts first, they were tared each morning—horse, harness, and carts being weighed as they came on the ground, and the tare thus obtained was the one used during the whole of the day. The horse, harness, and full carts were carefully weighed each journey, the morning's tare deducted, and the net weight ascertained. These carts only held an average of 1 ton of coal each, and weighing out of a cargo in such small lots with a slight turn of the beam, however slight it may be, must make a difference as compared with the weighing in by trucks containing 10 tons. It would, of course, be possible for some of the carts to pass out unweighed, although the Chamber of Commerce have watchmen there to protect the quay, and prevent anything of the kind. We then proceeded to examine the trucks, and found some with very low sides, from which coal must necessarily fall off in the process of shunting. These, however, the Dieppe Chamber of Commerce had already protested against as not being suitable for the coal trade. The weighing machines were situated some 500 yards from the discharging berths; but no truck could by any means reach the discharging berths, or be taken away without passing over the weighing machines. The trucks were invariably tared each time before they were allowed to pass to the discharging berths, and again weighed outwards when loaded; and we had trucks brought back and re-weighed with satisfactory results. These trucks were weighed singly, and afterwards re-weighed coupled up in trains, the latter being the usual way of weighing them at Dieppe; and although a difference was found, it was mostly in favour of the ship, and would not make an appreciable difference in the cargo.

“Respecting the weighing itself, no notice was taken of 5 kilos. or under, but over 5 kilos. was reckoned as 10 kilos., and this is nominally against the ship. The railroads between the

weighing machines and the discharging berths were examined, and no appreciable quantity of coal was found upon them; still there must of necessity be some waste by coal falling off the low-sided trucks, and by dust blown away; but the latter is obviously an inseparable incident of the trade. It is, perhaps, needless to say that all the weighing machines were in perfect order, and the weighers appeared to be of more than ordinary intelligence. In order to avoid any question of improper weighing at Dieppe, we are of opinion that the following recommendations might be carried out with advantage:—

“The quay is entirely open to the road, and although protected by the watchmen, it would be more satisfactory if a fence or wall separated it from the public highway. At present the carts may leave the quay at different points, and this must make it difficult for the officers of the discharging ship to properly check the outgoings, or the weighings, and on this account we think there should only be one way in and one way out—an arrangement that could be made if a fence were erected.”

Recommendations of the delegates.

“Notwithstanding our high opinion of the honourable conduct of the officials of the Chamber of Commerce, and the extreme care with which they conduct their operations, it would be better if the coals for the cranes were brought daily by the contractor and placed alongside each crane, so that there could be no temptation for the crane men to take coals from any other source.

“We advise the absolute abandonment of the low-sided trucks for the purposes of the coal trade.

“We also recommend our chamber to take steps, in conjunction with the Dieppe Chamber, to have a cargo specially weighed in at Cardiff, accompanied on a voyage, and weighed out at Dieppe, in order to ascertain the results of absolutely correct weighing here, and equally correct weighing at Dieppe. Our proposal is that these operations should be carried on under the superintendence of representatives of both chambers.

“In the afternoon a conference, under the presidency of M. Hendlé, Prefect of the Department, was held in the offices of the Chamber of Commerce. The French delegates present, in addition to the members of the Dieppe Chamber of Commerce, were M. Canët, President of the Tréport Chamber of Commerce; M. Manchon, Vice-President of the Rouen Chamber of Commerce; MM. Depeaux and Leblanc, delegates from the Rouen Chamber of Commerce; M. Jardin, delegate from the Havre Chamber of Commerce; M. Le Borgne, delegate from the Fécamp Chamber of Commerce; MM. Level and Leroux, delegates from the Saint Malo Chamber of Commerce; and M. David, delegate from the Saint Nazaïre Chamber of Commerce. From South Wales there were this Chamber's delegates, Mr. L. Wood, President; Mr. C. A. Heywood, Vice-President; and Mr. W. J. Tounce (Mayor of Cardiff); together with the repre-

Conference at the Chamber of Commerce.

representatives of the Swansea Chamber of Commerce, Messrs. Evans and David, also the French Consul at Cardiff, M. de Trobriand.

Summary of
proceedings.

"The proceedings may be briefly summarised as follows:— There was a general expression of satisfaction that the Cardiff Chamber of Commerce had obtained from the dock authorities at Cardiff an undertaking to re-tare the coal wagons after shipment in order to arrive at the exact weight of coal shipped. The Cardiff delegates in reporting the effect of this undertaking, pointed out that the dock authorities would not re-tare unless requested to do so by their customers, the shippers, and, therefore, that the buyers could only ensure that the weight of their coal would be arrived at in that way, by making it a condition of their contracts, and by insisting upon a certificate as to re-taring from the dock authorities, which certificate might with advantage be authenticated by the French Consul at Cardiff.

"After disposing of the question of re-taring the French delegates raised that of the weigher's wages, suggesting that payment by the ton offered a premium upon over-weighing. The Swansea delegates thereupon stated that their weighers were paid by the week and not by the ton. The Cardiff delegates, however, pointed out that it was very desirable to pay by the ton in order to obtain dispatch, and that the risk of over-weighing, in order to obtain a slight increase of wages, was too remote to counter-balance the good effect upon dispatch, of payment by results. A suggestion was subsequently made that the difficulty might be met by payment per wagon, but finally it was resolved that matters should be left in statu quo, the Cardiff delegates agreeing that, if the Dieppe Chamber of Commerce again objected to the mode of paying the weighers, the question should be brought before the Cardiff Chamber of Commerce.

"After it had been made apparent to the members of the conference that a statement of the colliery weight of each cargo (for which they had asked) would be absolutely without value, the Vice-President of the Dieppe Chamber stated that his Chamber proposed, with a view to preventing disputes between merchants and shipowners, that in future, no claim should be made upon the ship in respect of the first 1 per cent. of short weight, and that one half of the allowance should be borne by the South Wales shipper. The Swansea delegates stated that this arrangement would be acceptable to them, but the Cardiff delegates felt bound to say that they could not hold out any hope of its being recommended by their Chamber, or, if recommended, accepted by the Cardiff shippers.

"It was shown also that any allowance on the quantity would be inevitably followed by a corresponding advance in price, so that the whole 1 per cent. would, in result, be paid for by the buyer, while the allowance to the ship would not satisfy the shipowner, and was undesirable in other respects.

"The Cardiff delegates stated as their opinion that, given irreproachable weighing both at shipment and on discharging, the ship should not be relieved of responsibility for right delivery

of cargo, and that perfect weighing would probably dispose of most of the difficulties with shipowners.

"The meeting thereupon resolved that the present system should not be interfered with, at least until the result of the improved weighing shall have been ascertained.

"A suggestion that a common form of charter-party for the French ports should be agreed upon in South Wales was followed by an arrangement that the French Chambers should draft a form for submission to the shippers and shipowners in Cardiff and Swansea.

"The conference, which had lasted over three hours, then ended. We returned from Dieppe by the afternoon steamer on the 8th inst. We cannot conclude our report without acknowledging the excellent arrangements made for our reception and entertainment by the President and Members of the Dieppe Chamber of Commerce. Their hospitality was of the most unbounded character, and many distinguished Frenchmen came from a considerable distance to meet us, and to take part in our reception. For all the delicate compliments paid to us, and the lavish hospitality we enjoyed, our best thanks are due.

"Cardiff,
"December 14, 1893."

"L. WOOD.
"C. A. HEYWOOD.
"W. J. TROUNCE."

Population, Health, Industry.

The number of the population of Dieppe is 23,050.
In 1893 there were registered at the Mairie:—

Population.

Description.						Number.
Births	..	..	..	..	..	701
Deaths	..	..	..	..	..	705
Marriages	..	..	..	..	..	173
Divorces	..	..	..	..	..	6

There have been two mixed marriages, pursuant to the Foreign Marriage Act, 1892, solemnized under local law in the presence of the Vice-Consul, and registered by him.

The outbreak of cholera was not severe in this district, but it was at one time difficult, through the reticence of the authorities on the subject (in which they are not singular), to arrive at an exact estimation. Reports becoming exaggerated, the consequence was that the very result which the municipality feared, namely, keeping foreign visitors away during the season, was brought about by concealment of its existence, though of small extent, until silence could no longer be preserved. Many persons were likewise deterred from foreign travel through rumours of the prevalence of cholera on the Continent, though from the numerous letters of enquiry I received at this port their fears

Cholera not
severe at
Dieppe.

appeared to be not so much of cholera itself as of possible and vexatious quarantine regulations.

Results of the herring fishery.

The herring fishery on which so many French fishermen depend has produced very bad results during 1893, and is gradually diminishing year by year. History relates that Dieppe was the cradle of the fishery trade in France, that its herring fishery existed before 1030, and its Newfoundland cod fishery before 1500. Dieppe also in former times equipped vessels for the whale and the cod fishery in Iceland, and these formed during a long series of years one of its branches of commerce; but times have changed, and, although so recently as 30 years ago, between 25 and 30 vessels belonging to Dieppe shipowners were employed in the Newfoundland cod fishery, now not a single vessel is fitted out for Newfoundland from this port, though a few still are manned from the neighbouring ports of St. Valéry-en-Caux and Fécamp.

Importance of Dieppe fisheries in former times.

Decline of the fishing trade.

Public Works.

New dry dock not yet opened.

The dry dock which it was thought would be finished and opened last year is not yet quite ready to receive shipping. The masonry is all completed, but there still remains a small promontory, so to speak, of rocks and earth between it and the main channel, which is now in course of removal.

Submarine telegraph cable repaired.

In the month of July the English steamship "Lady Carmichael" was engaged in repairing the submarine cable between this port and Beachy Head.

Opposition to the proposed canal between Dieppe and Paris.

The idea of constructing a maritime canal between Dieppe and Paris is again being mooted by those who cite the Manchester Ship Canal as an example of what courage and perseverance can effect, and M. Mesureur has laid upon the table of the Chamber of Deputies a summary report on the proposal of M. Jacques tending to certify as of "public utility" the project of a maritime canal from Rouen to Paris; but the Chambers both of Dieppe and Rouen have written to the Senators and Deputies of the department reminding them of the energetic protest they made some years since declaring that the same arguments against these projects are still in force, and begging them to use their influence in order that it may again be negatived by Government.

Manœuvres of torpedo boats.

Torpedo boats, the utility of which is now so universally recognised in case of war, are frequently running in and out of Dieppe Harbour, and last June a flotilla of seven rapidly entered the port and anchored at the station I mentioned in last report as specially assigned to them in the floating dock.

General Remarks.

Drought in 1893.

Abnormally dry weather prevailed in this part of France in the early spring, and throughout the summer the excessive drought seriously affected this district, barley and oats especially suffering, the ponds in all the villages were for a length of time

completely dry, and cattle had to be driven miles to streams to obtain water. There was consequently a scarcity of hay and grass, and it was a bad sign to see cows tethered in oat fields in July, in fact the drought was becoming disastrous when in September and October torrents of continuous rain fell, helping to swell the root crops, making the grass grow, and replenishing the ponds. The price of forage increased greatly, but, on the other hand, it was a very good fruit year. Apple, pear, and plum trees bore prolific crops, as well as peaches and apricots. The drought brought out myriads of insects which infest apple and pear trees in Normandy, but, nevertheless, it was an exceptionally good apple year, which as apples had been scarce and dear for the past 2 years was fortunate. As a consequence there was an increased export trade in fruit to England. Dieppe also at Easter-tide contributes to the decoration of London churches, for although it does not export daily 12,000 flowers of narcissus at 3*d.* per dozen like a single flower farm of the Scilly Isles, enormous quantities of yellow jonquils ("Lent lilies") gathered wild in the fields round Dieppe are forwarded in crates to the London market.

Increased
price of
forage.

Export of
fruit to
England.

My thanks are due to the Sous-Préfet for the following information concerning the harvest:—

Report of
the harvest.

Wheat, middling crop, but of good quality.

Barley, deficient crop.

Oats, deficient crop.

Hay, scarce, but in some places very good.

Trefoil, sainfoin, lucern, weak crops.

Beetroot, fairly good crop.

Colza, medium crop, but of good quality.

Apples, very plentiful.

Potatoes, good.

Herring fishery, bad as regards Dieppe.

Fishing trade in general, pretty good.

Sanitary condition of animals, good.

Having been so successful in improving the breed of horses in France through the introduction of the best English blood, sportsmen are turning their attention seriously to improvement in the breed of dogs.

The "Société de 'Field Trials' de Normandie" for pointers and setters, at which many English dogs compete in the International Stakes, have fixed their meeting for 1894 at Bolbec in the Seine-Inférieure on March 27 and 28, and the "Société Centrale pour l'amélioration des Races de Chiens en France," President the Prince de Wagram, invite English breeders to send their sporting dogs to compete at their International Field Trials to be held at Bouleauville a day or two after the meeting at Bolbec. Bouleauville is on the main line of the Western of France Railway from Dieppe to Paris, Station Liaucourt, Saint Pierre.

French
societies to
encourage
sport, and
especially
improvement
in the breed
of dogs.

The number of dogs imported from England via Dieppe in 1893 was 210. Horses, 82.

Number of
dogs imported
from
England.

Foreigners who come to reside in Dieppe, as in other towns

Foreigners in France, for the purpose of pursuing any profession or trade are now obliged to make at the Mairie at a cost to themselves of 2 fr. 15 c. per head, a "Déclaration de résidence," the particulars of which are entered into a register kept for the purpose. This rule applies also to English domestic servants in families.

Annex A.—RETURN of all Shipping at the Port of Dieppe during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.		Total Number of Crews.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British	18	6,286	380	150,007	398	156,292	5,502
Passenger steamers of the London, Brighton, and South Coast Railway Company ...	...	...	497	159,761	497	159,761	12,426
French passenger and cargo steamers, Dieppe and Newhaven ...	...	...	623	70,343	623	70,343	11,036
Steamers, French Company, Dieppe and Grimsby ...	...	...	146	25,008	146	35,908	2,182
French	42	3,043	26	8,378	68	11,421	544
Norwegian	28	15,183	14	5,800	42	20,983	565
Swedish	3	790	4	1,949	7	2,739	83
Russian	11	4,496	...	...	11	4,496	114
German	3	1,271	3	1,552	6	2,823	76
Danish	6	1,706	2	1,035	8	2,741	73
Dutch	1	453	1	413	2	866	27
Italian	1	769	...	...	1	769	14
Belgian	...	...	2	523	2	523	32
Austrian	1	378	...	...	1	378	12
Total	113	34,474	1,698	464,774	1,811	489,248	32,608
" for the year preceding ...	162	31,365	1,516	430,476	1,678	461,835	25,382

NOTE.—Of the foregoing 55 vessels of 45,272 registered tonnage arrived from ports other than British ports.

CLEARED.

Nationality.	Sailing.		Steam.		Total.		Total Number of Crews.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British	18	6,385	380	170,007	398	176,392	5,502
Passenger steamers of the London, Brighton, and South Coast Rail- way Company ...	...	...	497	169,761	497	159,761	12,425
French passen- ger and cargo steamers, Dieppe and Newhaven ...	...	...	623	70,343	623	70,343	11,030
Steamers, French Company, Dieppe and Grimsby ...	...	...	146	35,008	146	35,008	2,182
French	42	3,043	26	8,378	68	11,421	544
Norwegian	28	15,183	14	5,800	42	20,983	505
Swedish	3	790	4	1,949	7	2,739	83
Russian	11	4,496	...	...	11	4,496	114
German	2	1,271	3	1,552	5	2,823	75
Danish	6	1,706	2	1,035	8	2,741	73
Dutch	1	453	1	413	2	866	27
Italian	1	769	...	...	1	769	14
Belgian	...	...	2	528	2	528	22
Austrian	1	378	...	...	1	378	12
Total	113	34,474	1,698	454,774	1,811	489,248	32,608

RETURN of British Vessels Entering the Undermentioned
Ports in this Vice-Consular District during the Years
1892-93.

Ports.		1892.		1893.	
		Number of Vessels.	Tons.*	Number of Vessels.	Tons.*
Tréport	Sailing ...	253	...	21	...
Eu	Steam ...	...	...	226	...
	Sailing ...	4	...	8	...
Total		257	...	255	...

* No return of tonnage received.

NOTE.—Comprised in the number of steamships at Tréport is one which plys weekly between that port and London.

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FRANCE.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF THE CONSULAR DISTRICT OF
SAIGON.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1175.

*Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1894.*

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FRANCE.

SAIGON.

Consul Tremlett to the Earl of Rosebery.

My Lord, Saigon, February 25, 1894.
I HAVE the honour to transmit to your Lordship my Annual Report upon the Trade, Commerce, and Navigation of Saigon for the year 1893, with sundry remarks pertaining to other parts of the Colony of Indo-China.

I have, &c.
(Signed) C. F. TREMLETT.

Report on the Trade, Commerce, and Navigation of Saigon for the
Year 1893.

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Tonkin.

The delta may be considered as being fairly under control, but, apart from that, the province is continually raided by so-called pirates. There are now at least three Frenchmen in captivity of whose fate the public knows nothing; they are no doubt being held for ransom.

1. Monsieur Roty, an employé of railroad contractors, was captured on July 28, while in charge of a gang of coolies, by a band of some 40 strong, and carried off. This took place near Song-hoa.

2. Monsieur Bouyer was also captured at the same place on August 5, and carried off. A companion was wounded by a rifle-ball, but the miliciens in attendance prevented his capture. These two events are laid to the imprudence of the above-named employés, who declined an escort, though in the latter case there appears to have been one.

3. Monsieur Fitzlumbert, a surveillant of the Government, was captured on October 10 at Sin-gain, not 40 miles from Hanoi, upon the line which is already running several regular daily trains, and a few hundred yards from a military post.

Lest it should be considered that I am inclined to exaggerate adversely the state of the country, the following extract from the "Courrier d'Haïphong" of October 15, 1893, is given:—

"Since two years, not a month, not a week has pas-ed without reports of shots exchanged, gangs of 'pirates' broken up, engagements more or less bloody. The number of 'pirates' has certainly not diminished, and their audacity has increased. . . . The 'pirates' cannot be left eternally masters of that magnificent region."

BUDGET of Haïphong.

RECEIPTS.

Description.				Amount.	
ORDINARY.				Dollars.	Dollars.
Impôt Foncier	..	..	..	10,500	
" patentes	..	..	..	20,000	
Head tax—					
Foreign Asiatics	..	..	..	20,000	
Natives	..	..	..	300	
Markets and slaughter-houses	..	..	..	10,500	
Location	..	..	..	2,800	
Cemetery	..	..	..	100	
Etat Civil	..	..	..	2,310	
Police, &c.	..	..	..	7,550	
Recettes en atténuation	..	..	..	3,000	
" divers	..	..	..	100	
Reliquat des exercices antérieurs	..	..	..	3,000	
					80,160
EXTRAORDINARY.					
Subvention de Protectorat pour éclairage électrique	..	..	..	..	6,000
Subvention de Protectorat pour éclairage électrique—roads	..	..	..	..	4,000
Total	..	..	..	..	90,160

EXPENSES.

Description.	Amount.	
	Dollars.	Dollars.
OBLIGATOIRES.		
Service de la Mairie	1,230	
Allocations diverses	3,330	
Perception	1,000	
Réparations	250	
Service de Santé Indigène	1,400	
Police—		
Européen	19,870	
Indigène	3,580	
Matériel divers	360	
Roads	6,182	
Personnel Indigène	2,952	
Matériel—mes. squares	7,470	
Dispensaire	590	
Cimetière	574	
Eclairage	20,000	
Travaux d'entretien	1,000	
Annuités	1,250	
Indemnités	1,000	
Dépenses divers	170	
Dégrèvements	250	
3 pour cent sur Patentes revenant aux Chambres de Commerce	450	
		72,908
FACULTATIVES.		
Frais de Fête 14 juillet	..	1,000
„ divers	..	450
Gratifications pour Caisse de piastre	..	1,000
Subvention Races	..	500
„ St. Enfance	..	500
Imprévues	..	3,802
Dépenses sur l'exercice clos	..	10,000
Total	..	90,160

The Hongay coal mines continue to send steady shipments of Charbon-coal to Hong-Kong, for the most part dust, which is made into briquettes. nages.

The company of the Kebao' has contented itself with con- Kebao mines. tracting with local navigation and industries.

A match factory and a paper factory have been opened Factoris. during 1893 with good results; the latter utilise the bamboo partly.

Annam.

The affairs of this kingdom have moved smoothly, and little has been heard from it.

Cambodia.

There is nothing particular to remark. The revenue appears to be in a fairly sound condition. The town of Pnumpruh and its vicinity have been much improved by draining.

A canal, called Vinhote, is being cut from the Bassac to the Gulf of Siam, between Hatien and Chaudoc, of a breadth of 20 metres.

The budget has been taken over by Indo-China, and a sum of over 400,000 dol. (50,000*l.*) allowed to the royal treasury for the use of the King. The budget has been fixed at 1,413,500 dol. (177,000*l.*).

In direct foreign commerce this country cannot participate, having but one port (Kampot), which is not accessible to ships even of very light draft, so nearly all its exports pass through Saigon.

Cochin-China.

The season 1892-93 produced the largest grain crop ever known, and planters having had their own way as regards price, the market remained comparatively high throughout, say, at an average of 4*s.* 3*d.* for 20 per cent. cargo rice, *t.o.b.*, per *cwt.*, in gunnies, duty paid.

The grain of this colony is, as cannot be disputed, inferior to almost any other that can be named; it is mean in appearance, irregular, and would not be favoured except for its comparative cheapness at times. In France it enjoys the advantage of a lesser duty. The cause of this inferiority is not far to seek; it is principally due to the negligence of planters, who, knowing that the greater part of their harvest is almost certain to be exported to China, do nothing to improve its quality, not even by selecting grains for seed, which would be no difficult task.

Various essays have been made during a series of years to introduce Burmese grain for planting, but there always appears one or another reason why the trials prove unsatisfactory.

Exports.

The export of rice was 10,930,709 piculs, equal to 650,637 tons, an increase upon the export of 1892 of 1,845,009 piculs, or 109,822 tons, but to this should be added broken rice and rice flour, as actual outcomes of the crop, 763,976 piculs, bringing the total to 11,694,685 piculs, equal to 696,109 tons, and the increase over last year to 2,608,935 piculs, or 155,294 tons, as shown in the following tables:—

	Quantity.		Value.	
	Piculs.	Tons.	Currency.	Sterling.
White rice	2,710,441	161,335	Dollars.	£
Cargo „	5 298,258	315,372	5,732,600	716,575
Paddy	2,922,010	173,928	8,874,600	1,109,325
Farine and broken ..	763,976	45,474	3,827,800	478,475
			382,000	47,750
Total	11,694,685	696,109	18,817,000	2,352,125

STATEMENT of Rice Exports for 1893.

Countries.	Ports.	Quantity.	Total.
		Piculs.	Piculs.
China	Hong-Kong	6,077,319	6,715,652
	Amoy	638,333	
Straits	Singapore	..	1,312,870
Java	Soerabaya	689,907	715,886
	Samarang	23,000	
	Batavia	2,979	
		..	
Philippines	Manila	300,040	521,720
	Cebu	18,739	
	Iloilo	202,941	
Japan	Kobe	..	50,520
Tonkin	Tourane	..	108,513
France .. ..	.. ..	..	1,130,101
Europe	Port Said, f.o. ..	724,136	1,058,922
	Queenstown, f.o. ..	211,523	
	Continent	123,263	
Réunion	Port	..	25,028
America	Rio de Janeiro ..	..	55,473
		..	..
	Total	..	11,694,685

Regarding the crop now being harvested (season 1893-94), every confidence had been felt that it would be at least equal to that of the previous season, the weather having been exceptionally favourable in most, and these the principal provinces, but late floods in some parts and prematurely dry weather in others has brought the estimate down to 75 per cent. of the last crop, say 8,000,000 piculs, still an outturn quite up to an average one.

Export duty upon rice and paddy has been fixed as follows, to take effect from January 1, 1894:—

Increase of
export duty.

Articles.	To—	Per 100 Kilos.
		Cents.
Rice and paddy.. ..	Foreign countries ..	26
"	France and colonies ..	17
White rice	Philippines	208

that is, about 16 c. and 10½ c. per picul, against the old rate of 15 c. and 10 c. per picul.

TABLE showing Quantity and Value of other Produce.

Produce.	Quantity.		Value.	
	Piculs.	Tons.	Currency.	Sterling.
			Dollars.	£
Beans	15,254	908	46,000	5,750
Betel nut	12,410	748	323,000	40,375
Cardamoms	98	6	4,400	550
Cocoonut oil	88	5	880	110
Coprah	29,383	1,749	162,000	20,250
Cotton	66,221	3,942	397,000	49,625
Fish	291,968	17,380	1,752,000	219,000
Gambogo	1,395	842	91,000	11,375
Hides	9,008	537	135,000	16,875
Horns	1,864	111	45,000	5,625
Isinglass	305	18	12,000	1,500
Lard	5,198	327	71,000	8,875
Pigs (live)	7,205	429	72,000	9,000
Pepper	23,228	1,384	534,000	66,750
Salt	200,465	11,933	26,000	3,250
Silk	1,594	95	360,000	45,000
Wood	8,061	490	17,000	2,125

Cotton.

With the exception of 200 piculs to Marseilles, the entire crop was shipped to China and Japan. The production increases yearly; it has nearly trebled since 1891. Export duty is 66 c. per 100 kilos. (1s. 2d. per cwt.).

Coprah.

Two-thirds of the produce went to Singapore and one-third to France, but a great part of the former was again transhipped to Europe.

Fish.

The bulk of the take went to Hong-Kong and Singapore, two-thirds to the latter port, as usual. Export duty is 1 dol. per 100 kilos. (1s. 9½d. per cwt.), and upon caviare 50 c. per 100 kilos. (10½d. per cwt.); half duty to France.

Horns.

One-half the export was to France.

Hides.

The greater part was shipped to London.

Pepper.

Nearly the entire crop was influenced to France by the partial protection from duty (one-half) allowed it. This favour has naturally led to increased cultivation, and the outturn is more than double that of 1891.

The ultimate destinations of all shipments were to France silk and England.

All find their market in Singapore.

Hong-Kong is the principal market, where it is in much request for cabinet-making. Pigs (live).
Wood.

The production has trebled within three years.

Salt.

Exchange.

Exchange has followed the same course here as elsewhere, and while the continued decline has hampered business in various ways, and depressed values generally, it has at least facilitated export.

Rates have ruled as under:—

Description.	Usance.	From—	To—
London Bank Bills ..	Demand	2s. 9d.	2s. 3½d.
Private Bills.. ..	3 months' sight	2s. 10½d.	2s. 4½d.
Hong-Kong Bank Bills	Demand	Par	1½% discount
Private Bills.. ..	15 days' sight	2½% discount	3½% discount
Singapore Bank Bills ..	Demand	Par	¼% discount
Private Bills.. ..	30 days' sight	1½% discount	1½% discount
Manila Private Bills ..	30 days' sight	8% premium	3% premium
Japan Private Bills ..	30 days' sight	2½% discount	3% discount
Java Private Bills ..	30 days' sight	172 florins	148 florins

The official dollar rates closed at 3 fr. 15 c.

BULLION.

					Amount.
					Dollars.
Coin imports	..	..	..	..	1,956,980
„ exports	..	.	..	..	34,200

Shipping and Navigation.

The number of vessels of all nations which cleared from Saigon during the year 1893 was 437, of 476,113 tons; to these are added, as usual, for the sake of reference, the steamers of the Messageries Maritimes, those of the Compagnie Nationale, and the Bangkok boat, which augment very considerably the amount of French tonnage, while not exclusively nor in any great degree pertaining to the commerce of this port; these bring the total tonnage to 574 vessels, of 685,524 tons.

The British flag accounts for 166 vessels, of 206,284 tons, a proportion to the total tonnage of seven-sixteenths.

The average tonnage of British vessels was 1,244, that of the total tonnage 1,089 tons.

STATEMENT of British Shipping Entered.

Class.	Number of Vessels.	Tons.	Crews.
Steam.. .. .	158	192,576	5,748
Sail	8	13,708	195
Total	166	206,284	5,943

CLASSED according to Nationalities.

Nationality.	Steam.		Sailing		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
American	...	...	3	3,693	3	3,693
Austrian	3	5,287	...	...	3	5,287
British	158	192,576	8	13,708	166	206,284
Dutch	15	15,325	3	4,850	18	20,175
French	...	...	5	4,511	5	4,511
German	210	206,200	1	1,400	211	207,600
Italian	4	1,394	2	2,329	6	3,723
Japanese	3	5,531	...	...	3	5,531
Norwegian	15	17,551	...	...	15	17,551
Spanish	7	4,215	...	...	7	4,215
Total	415	446,022	22	36,091	437	476,113
Messageries Maritimes	108	155,644	...	...	108	155,644
Compagnie Nationale	21	50,558	...	...	21	50,558
Bangkok boat	8	3,609	...	...	8	3,609
Grand total	562	655,463	22	36,091	574	691,554

Rates of freight ruled as under:—

Country.	Per Picul.	
	From—	To—
	Cents.	Cents
Singapore	6	15
Hong-Kong	6	16
Philippines	18	25
Amoy	16	20
Swatow	15	20
Tourane	18	22
Java	17	22

Coral bank.

Its removal has been found more difficult than was anticipated and the work is still going on; it is hoped, however, that the obstruction will be entirely cleared away by May, 1894.

Tonnage dues.

By a decree of March 10, 1893, vessels are to be exempt as follows —

1. All vessels loaded with petroleum.

2. All vessels or lines making regular trips. A quarterly voyage to be considered regular; otherwise the tax is unaltered, except that one-fifteenth is allowed for the benefit of the Chamber of Commerce.

Several buoys have been placed in position, but they are not used unless the ordinary anchorages are fully occupied, the berths not being popular either with ships or pilots. Bank moorings.

Imports.

No statistics will be obtainable for some months to come, may be noted:—

Country.	Coals.	
	Quantity.	Value.
	Tons.	£
French	2,739	4,600
Foreign	3,998	6,700
Annam	585	500
Tonkin	239	200

13,000 tons of petrol, value 74,367*l*. Petrol.

It is stated that 40,000 tons were imported of a value of something like 16,500*l*. Cement.

For the sake of comparison is appended a statement of the commerce of Indo-China for 1892:—

Country.	Importation.	Exportation.	Total.
	Francs.	Francs.	Francs.
Cochin-China and Cambodge..	35,546,628	80,706,856	116,253,483
Tonkin	28,432,772	10,851,036	39,283,798
Annam	4,671,473	3,513,688	8,195,166
Total	68,650,878	95,071,570	163,722,448

NOTE.—These figures are taken from the printed report; they do not total quite exactly.

General.

Foreign officers, 13 fr. per diem.

Foreign seamen, 9½ fr. per diem.

Hospital fees.

These are very high charges indeed, 50 per cent. higher for foreigners than for French patients of the same class. I addressed the Governor upon the subject, pointing out that in the hospitals at Hong-Kong and Singapore no distinction was made as regards nationality, but no reply has as yet been received.

It has been decided that none shall, for 1894, be levied upon French, foreign, or Annamite merchants. Patentes.

- Chinese, however, are not relieved from this tax.
- Police.** Some important arrests were made towards the end of the year of 12 leading Chinese, charged with bribery, and of sundry police, high officials amongst them, for receiving; since, all the Chinese but one have been released on bail, and it will probably be found undesirable to investigate this matter thoroughly.
- Distilleries.** The distillation of spirit from rice and otherwise is now free, subject to sundry regulations and to a deposit of 100*l*.
- Warehouses.** There has been established, but not yet opened, custom-house storage for goods in bond; private individuals can also open these warehouses under guarantee of from 20,000 fr. to 100,000 fr.; the store rent is fixed at 1 fr. per quarter for 1 metre cube or ton of 1,000 kilos.
- Opium.** The price fixed for the sale of opium is 94½ fr. per kilo., payable at the rate of the day.
- Land tax.** The impôt upon rice fields, and land under cultivation generally, has been increased 10 per cent.
- Stamp Act.** The question of a stamp duty upon commercial and legal documents has again been mooted, but deferred until the March session.
- Immigration.** Arrivals of foreign Asiatics, 23,550.
- Emigration.** Sorties of foreign Asiatics, 11,206.
- Saigon-Khone railroad.** The question of a railway from Saigon to Khone provoked a lively discussion in the Colonial Council, of which the upshot was that the Colony would engage itself to pay 500,000 fr. per annum provided that the Home Government pays the balance, *i.e.*, seven-eighths of the cost.
- The Saigon-Mytho railway is always in evidence; it cost, although constructed along a great highway, over 200,000 fr. per kilometre (crossing two rivers), or about 15,000,000 fr. altogether; it has now been in existence some seven years, but has rendered no real service to trade.

The proposed railway would be of the following length:—

						Length.
						Kiloms.
From Saigon	to	Bencat	..	..	..	54
		Bencat	Chontauh	..	..	32
		Chontauh	Caulé	..	..	38
		Caulé	Somrang	..	..	70
		Somrang	Stung Treng	..	..	148
		Stung Treng	Khone	..	..	68
Total						410

- Sanatorium.** The Sanatorium at Cape St. James has been now in operation for some months, and has no doubt rendered real service to the officials of the Colony; it is criticised of course by the malcontents who expect to find a first-class hotel in an hospital, and all the luxuries of Paris at Cap St. Jacques; it is not

evident why the benefits to be derived from this institution are confined to officials; there are many and constant convalescents who would gladly avail themselves of it, and it is difficult to see in what way their recovery is less interesting or desirable.

Again the Chinese clubs in Saigon and Cholon have been Clubs. suppressed, as being gambling houses, and their guarantees seized to the profit of the Treasury.

Impôt Foncier.

Taxes and
duties.

Saigon is divided into four zones:—

				Per Hectare.	Per 2½ Acres.
				Dol.	£
The 1st pays	..	..	..	375	60
2nd „	..	..	..	167	28
3rd „	..	..	..	63	10
4th „	..	..	..	50	8

Environs.

				Per Hectare.
				Dol.
Land with European buildings	..	..	..	25
Other land	..	..	..	2½

Interior.

Land is taxed variously, the series is long, from (as above) 25 dol., to third quality of rice field, 20 c. per hectare.

Salines, 4 dol. to 2 dol. per hectare.

Plantations of indigo and cotton are exempt.

Head tax, Annamite, 40 c.

Native boats, 11 dol. 30 c. to 60 c. according to capacity.

Native sea-going vessels, 2 dol. 81 c. to 4 dol. 68 c. per metre beam.

Patentes.—There are eight classes of patentes, from 400 dol. to 80 c., plus 1½ per cent. for the benefit of the Chamber of Commerce.

Head Tax.—Foreign Asiatics, 80 dol., 30 dol., 7 dol. Passports, 2 dol. 50 c.

Cattle, 1 dol. per head export duty.

Swine, 75 c. per head export duty.

Wood, 100 fr. to 5 fr. per metre cube.

Telephones, 50 dol. per annum.

New waterworks have been voted.

Municipality
of Saigon.

The question of electric lighting has been mooted, but does not find great favour; it is thought preferable to increase the number of lamps under the present system, and substitute an improved burner.

New Buildings.—Votes have been passed for:—

Description.							Amount.
							Fr.
Theatre	..	..	..	..	..	..	800,000
City Hall	..	..	..	..	..	..	600,000
Markets	..	..	..	..	..	..	400,000

Military
(550,000 dol.
approximate).

The political situation as concerned Siam forced the administration to increase the number of native troops, against the views of the Colonial Council. The camp of the Tirailleurs which had been transferred, for reasons of convenience, from the old encampment, about midway between Saigon and Cholon, to an open space approximate to European barracks, was again transferred to its ancient premises, for sanitary reasons.

Posts and
telegraphs
(675,000 dol.
approximate).

The services of the post office and telegraphs has been installed definitely in its new building; it is certainly a magnificent construction, and consequent upon improved facilities the service leaves nothing to be desired, except the sorting of the mails between Singapore and this port. The lapse of time between the arrival and delivery of the mails could be reduced at least one half, it is now some 3 hours or more.

The length of wire and cable in the colony is now 3,135 miles.

BUDGET for 1894.

RECEIPTS.

Description.	Amount.			
	Dol.	c.	Dol.	c.
Sales of land and concessions	15,682	0		
Permits to cut timber, &c.	67,157	78		
Revenues indirects (réserve)				
Post office and telegraph	85,000	0		
Bailiff's fees and seizures	73,546	6		
Permission to carry firearms	1,376	76		
Passports	12,717	0		
Duplicate papers, native vessels	2,060	28		
" " foreign Asiatics	2,940	70		
Jail work	2,050	0		
Interest and redemptions	3,493	74		
Advertisement in Government papers ..	3,000	0		
Overplus (?)	20,000	0		
Verification of weights	800	0		
Repayment from Cholon for services ..	2,000	0		
" " Saigon loan	18,752	88		
Divers receipts	8,954	64		
Cambodge contribution, Mess. Fluviales, &c.	27,500	0		
Railroad Saigon to Myitho payment ..	25,000	0		
Repayment from Protectorate for prisoners	2,800	0		
" " railroad (advance)	4,000	0		
Le-van-nheim, Debtor (réserve)				
Products of the "Garden"	1,395	35		
Saigon share of expenses, College Ch. Laubat	8,100	0		
Saigon share of scholarships, College Ch. Laubat	4,650	0		
Payments from native scholars	1,000	0		
" " Cambodge, Post and Telegraph a/c	4,520	0		
Payments at Sanatorium at Cape St. James	7,500	0		
" " from Aud. of Gocong (advance)	2,333	33		
RESSOURCES EXTRAORDINAIRES.				
	Dol.	c.		
Balance from 1892 (réserve)				
" " 1893	400,000	0		
Due by Cambodge a/c Mess. Fluviales	29,166	66		
Due by Tonkin	260,000	0		
Sundries	14,020	0		
	703,186	66		
			1,111,617	18
CONTRIBUTIONS INDIRECTES.				
Impôt Foncier des Centres	34,795	73		
" " Salines	3,650	57		
" " Rice fields, 1st class	399,022	0		
" " " 2nd "	110,534	04		
" " " 3rd "	35,132	53		
" " Sundry culture, 1st class.. ..	165,602	90		

RECEIPTS—continued.

Description.	Amount			
	Dol.	c.	Dol.	c.
CONTRIBUTIONS INDIRECTES—continued.				
Impôt Foncier, sundry culture, 2nd class.	68,212	27		
Impôt Foncier, sundry culture, 3rd class.	11,782	3		
Natives, head tax	206,156	0		
boats.	76,263	46		
Patentes	169,757	79		
Foreign Asiatics head tax	482,720	0		
			1,763,629	32
Registration and mortgages	90,000	0		
Tonnage dues.	70,000	0		
Fisheries and ferries.	64,415	14		
Mont de Piété	20,000	0		
Opium.	3,195,900	0		
Spirits.	636,000	0		
Export duty on rice and paddy	1,460,000	0		
Import duty on spirits	30,000	0		
Export duty on cattle	11,000	0		
Storage petrol	30,000	0		
Fines and confiscations	30,000	0		
Accessory	3,000	0		
Import duty	1,484,576	40		
Other export duties	230,000	0		
			7,324,991	54

NOTE.—The budget is put at 10,000,000 dol. approximately (1,250,000/).

BUDGET for 1894.

EXPENSES.

Description.				Amount.			
OBLIGATORY.				Dol.		c.	
				Dol.		c.	
Chapter I.—Governor-General—							
Complement of 60,000 fr. salary, Governor-General				1,500	0		
Representative, Governor-General				15,000	0		
Officers and employees, Governor-General's office				26,025	0		
Supplements, employees, Governor-General's office				7,213	50		
Native employees				7,448	0		
Abonnement de 33 pour cent				15,914	25		
Controller's office				19,162	75		
Less $\frac{2}{13}$ a/c Tonkin }				92,263	50		
Less $\frac{1}{13}$ a/c Cambodge }				49,680	33		
				42,583	17		
Inspection expenses				3,836	53		
				46,419	70		
Dépenses facultatives.. .. .				14,699	98	61,119	68
Chapter II.—Government of Cochinchina—							
Lieutenant-Governor, salary				7,500	0		
" representative				2,500	0		
Officers and employees				41,478	67		
Dépenses facultatives				14,576	81		
						66,055	48
Chapter III.—Administration, Central—							
Chefs de Service, officers, and employees ..				147,720	0		
Native employees				20,136	98		
Interpretation				10,191	69		
Immigration				8,839	52		
Police, European				43,653	50		
" Asiatics				14,794	79		
Steam launches				4,075	50		
Naval yard for services				4,243	75		
Complement				13,163	2		
				266,818	75		
Less in congé				35,000	0		
				231,818	75		
Dépenses facultatives				24,567	86		
Photographs of boys.. .. .				400	0		
Premiums for knowledge of Chinese ..				970	0		
" " Annamite and							
" " Cambodian				5,000	0		
" " Stenography				600	0		
						263,356	61
Chapter IV.—Administration of Arrondissement—							
Salaries of 46 administrators				180,546	87		
" 58 clerks				89,375	0		
Cost of administering the Islands of the Meikong and Stung-treng				90,000	0		

(1711)

B

EXPENSES--continued.

Description.	Amount.			
	Dol.	c.	Dol.	c.
OBLIGATORY--continued.				
Chapter IV.--Administration of Arrondissement--continued.				
Salaries of 19 accountants	45,279	70		
" 28 Garde Forestiers	46,250	0		
" native functionaries	241,461	59		
	692,913	16		
Less congée	63,000	0		
	629,913	16		
Dépenses facultatives additional	19,866	86		
			679,780	2
Chapter V.--Military, native--				
Etat Major	20,925	0		
Company officers	61,959	87		
" native (4 sous-lieutenants)	1,890	0		
Office expenses, &c.	2,841	61		
Allowance to officers for Oriental tongues ..	3,400	0		
Mounts for officers	7,155	25		
25 per cent.	2,412	67		
3 European armorers, 2 sergeant majors, 5 sergeants, 5 corporals	1,890	1		
Sous-officers, 8 adjutants, 12 sergeant majors, 108 sergeants	22,639	83		
Complementary, 33 per cent.	16,893	8		
Natives--68 sergeants, 148 corporals, 24 buglers, 2,160 tirailleurs	179,813	50		
Indemnities, &c., for food to Europeans ..	33,986	74		
Prizes for sous-officers for Oriental languages	6,000	0		
Uniforms	6,300	0		
Extra maintenance	22,705	79		
" for long service, Europeans	9,451	44		
" " natives	11,345	39		
" for re-enlistment, natives	2,937	50		
" " Europeans	2,500	0		
Gratifications	7,508	74		
25 per cent.	15,687	22		
Indemnities, &c., for superior officers ..	6,368	63		
Pensions	18,566	40		
Complementary	29,338	99		
(Deduct about 10,000 dol. for incompletes)				
	490,513	45		
Camps and barracks	8,907	81		
Equipment and ammunition	25,871	14		
Supplements	40,468	50		
Sundries	2,134	56		
			549,460	17
Chapter VI.--Justice--				
Salaries of Procureur General, Avocat-General, secretaries, judges, interpreters, native functionaries, office expenses, and courts			397,643	77
Chapter VII.--Education--				
Salaries of professors, lodging allowances (incomplete)			326,166	97

EXPENSES—continued.

Description.	Amount.			
	Dol.	c.	Dol.	c.
OBLIGATORY—continued.				
Chapter VII.—continued.				
Land registry—				
Salaries of surveyors, designers	..		97,024	50
Chapter VIII.—Treasury—				
Salaries	..		93,973	51
Chapter IX.—Post office and telegraph—				
Salaries and expenses	..		674,231	38
Chapter X.—Registration—				
Salaries, &c.	..		33,168	7
Chapter XI.—Prison—				
Salaries of guardians, &c.	..		113,260	8
Chapter XII.—Hospitals—				
Salaries and expenses	..		99,318	68
Chapter XIII.—Ports and harbours—				
Salaries	..		13,352	40
Chapter XIV.—Printing—				
Salaries and material	..		53,152	10
Chapter XV.—Commerce, agriculture, industries—				
Salaries, encouragements, 27,000 dol.; theatre, 55,000 dol.	..		60,505	7
Chapter XVI.—Public works—				
Salaries	166,579	95		
Office expenses, &c.	19,000	0		
Ordinary up-keep of—				
Public buildings	25,000	0		
Roads, canals, &c., Saigon and vicinity ..	50,000	0		
Lighthouses	8,000	0		
Guarantee and work railroad, Saigon-Mytho	148,995	19		
Routes navigable—				
Dredging	310,000	0		
Customs expenses	60,000	0		
Port of Saigon—				
New signal staff	8,000	0		
Facing river bank, &c.	11,000	0		
Roads—				
Saigon to Gia-dinh	16,200	0		
„ Cholon	34,000	0		
„ Mytho	10,000	0		
„ Vinhlong	8,650	0		
„ Bienhoa	26,000	0		
„ Thudamot	8,500	0		
Cape St. James	10,000	0		
Public buildings—				
Repairs, Government House	21,100	0		
„ arrondissements	15,500	0		
„ military lodgings	16,000	0		
„ courts and lodgings	51,500	0		
„ sundries	2,000	0		
„ prison	10,750	0		
„ travaux publics	6,000	0		
„ custom-house and new go-down ..	30,220	0		
„ imprévus	25,000	0		
Subvention to arrondissement for work done on roads, &c.	92,000	0		
Route, Kratze to Stung-treng	42,000	0		
			1,231,995	1

EXPENSES—continued

Description.	Amount.			
	Dol.	c.	Dol.	c.
OBLIGATORY—continued.				
Chapter XVII.—Customs—				
Salaries	443,758	0		
Office expenses	1,825	0		
Indemnities, carriage, food, responsibility	11,907	0		
Employees' share of fines and confiscation	24,000	0		
Court expenses	1,500	0		
Sundry supplements	1,926	90		
Indemnities to interpreters, "senneurs"	9,648	10		
Salaries and wages, native employees	55,414	22		
Indemnity of 8 per cent. complementary	35,565	40		
Lighting, arms, launches, transport	26,655	25		
Printing	10,000	0		
Rents, &c.	5,280	0		
New construction and purchases of buildings, &c.	36,600	0		
Purchase of opium, 2,700 cases	1,620,000	0		
Transport of opium	18,506	0		
Cost of manufacture	48,600	0		
Weighing, packing, wages, &c.	128,000	0		
Secret service, informers	7,000	0		
			2,486,005	91
Chapter XVII.—bis. Customs—Cambodge—				
Salaries, Europeans	76,645	30		
" natives	21,568	90		
Indemnities and supplements	19,511	70		
Medical and passages	3,000	0		
Lighting, printing, transport, repairs, &c.	10,758	0		
Informers	1,000	0		
Payment to Royal Treasury, 7½ per cent. on 5,900,000 dol.	427,750	0		
			560,233	90
Chapter XVIII.—Sundries—				
Passages, &c.	60,000	0		
Medical, &c.	35,000	0		
Imprévu	21,250	0		
Police de Sûreté	3,417	50		
Gratifications	9,312	50		
Expenses of deputy	1,500	0		
Matériel, &c.	41,040	0		
Restitution	30,000	0		
Imprévu	40,000	0		
Sundry contributions to Saigon, Cholon, Colonial School, &c.	97,381	50		
Diplomatic presents and receptions	3,000	0		
Telegraphic messages	8,000	0		
" " to and from Deputy	5,231	50		
" " by Pres. Cons. Col.	800	0		
Public festivals	8,671	25		
Relief	21,800	0		
New papers	1,250	0		
Books and binding	14,000	0		
Subvention to Saigon	100,000	0		
			501,654	25
Chapter XIX.—Extraordinary—				
Contingent service, colonial	1,559,425	0		
" invalides	95,760	0		
Exchange	30,000	0		
Assistance	15,000	0		
			1,700,185	0

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1250. Leghorn	2d.	1308. Oporto	1d.
1251. San Francisco	5d.	1309. Naples	3d.
1252. Bushire	2d.	1310. Salonica	2d.
1253. Nagasaki	1d.	1311. Valparaiso	2d.
1254. Smyrna	1d.	1312. Mozambique	1d.
1255. Yokohama	1d.	1313. Odessa	1d.
1256. Stockholm	1d.	1314. Honduras	2d.
1257. Lisbon	1d.	1315. Batoum	4d.
1258. Tientsin	1d.	1316. Quilimane	1d.
1259. Port Said	1d.	1317. Copenhagen	1d.
1260. Hiogo and Osaka	2d.	1318. Lima	1d.
1261. Damascus	1d.	1319. New York	1d.
1262. Samoa	2d.	1320. Bagdad and Bussorah	1d.
1263. Rio Grande do Sul	2d.	1321. Rio de Janeiro	3d.
1264. Jeddah	1d.	1322. Rannion	3d.
1265. Vienna	3d.	1323. Berne	1d.
1266. Shanghai	3d.	1324. Kukiang	1d.
1267. Bangkok	1d.	1325. Resht	3d.
1268. Meshed	1d.	1326. Florence	1d.
1269. Cadiz	2d.	1327. Hakodate	1d.
1270. Cherbourg	1d.	1328. Paris	2d.
1271. Erzeroum	1d.	1329. Paramaribo	1d.
1272. Christiania	5d.	1330. St. Petersburg	2d.
1273. Buda-Pesth	1d.	1331. Patras	1d.
1274. New York	3d.	1332. Calvis	2d.
1275. St. Petersburg	7d.	1333. Loanda	1d.
1276. Alexandria	1d.	1334. Bordeaux	2d.
1277. Tokio	2d.	1335. Taganrog	1d.
1278. Bilbao	3d.	1336. Galveston	8d.
1279. Beyrout	6d.	1337. Riga	2d.
1280. Peking	2d.	1338. Batavia	1d.
1281. Salvador	1d.	1339. Boston	1d.
1282. Malaga	4d.	1340. Baltimore	1d.
1283. Buenos Ayres	8d.	1341. Havre	2d.
1284. Canton	1d.	1342. Vera Cruz	1d.
1285. Washington	4d.	1343. Saigon	1d.
1286. Warsaw	4d.	1344. Stockholm	2d.
1287. Peking	1d.	1345. Galatz	1d.
1288. Amsterdam	1d.	1346. Trebizond	1d.

No. 1347.

Reference to previous Reports, Annual Series Nos. 1180 and 1196.

F R A N C E.

ALGIERS.

Consul-General Playfair to the Earl of Kimberley.

My Lord, *Algiers, March 20, 1894.*
 I HAVE the honour to enclose my Annual Report on the Trade,
 Navigation, and Agriculture of Algeria for the years 1892-93.
 I have, &c.
 (Signed) R. LAMBERT PLAYFAIR.

*Report on the Trade, Navigation, and Agriculture of Algeria for
the Years 1892-93.*

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The Commission of 18 members of the Senate appointed to Commission study the actual condition of Algeria, and to suggest reforms, of enquiry. still continued its labours during 1893, but the subject had not been discussed in the Senate when that year terminated.

M. Franck Chauveau presented a report giving a detailed history of the origin and constitution of Mohammedan landed property in this country, and of the laws which had been passed in regard to it since the French Conquest. He proposes for the approbation of the Commission “des dispositions nouvelles sur l'immatriculation des immeubles et le régime de la propriété foncière en Algérie.”

This was discussed in the Senate in February, 1894. M. Paul
 (1702)

Gérente, Senator for Algiers, made some startling statements regarding the manner in which the Arabs were dispossessed of the land which they held in common (*indivis*) under the cloak of judicial process.

"On July 20, 1886, at the request of a creditor, an *avocat-défenseur*, at Orleansville, obtained the sale of 240 hectares belonging in common to 150 persons of the Ben Zaza tribe. The land was adjudged at the ridiculous sum of 1 fr. 50 c. per hectare, or 350 fr. But the costs, taxed before the sale, amounted to 44,212 fr. The spoliation of the Ben Zaza was complete.

"On August 2, 1887, the same *avocat-défenseur* obtained the sale of 120 hectares, of which 58 natives were proprietors in common. The adjudication was made for 525 fr. to a clerk in his office. The taxed costs amounted to 1,227 fr.

"On March 11, 1890, by the same *avocat-défenseur*, the sale of 120 hectares was effected of land belonging in common to 22 natives. It was the *chaouch*, or 'garçon,' of the same official who obtained possession of it for 505 fr. Each of the expropriated possessors obtained 23 fr. Pitiably irony."

There is small wonder that need is felt for a change in the law which governs Arab property.

A new and important industry has sprung up in Algeria, consequent on the discovery of workable beds of phosphates in various parts of the colony. In the department of Oran the most important are at Inkerman (Oued Riou), at Rio Salado, and at Kona, near Mascara. At these three places during 1892 1,514 tons of phosphate of lime were extracted, and 440 tons exported. In 1893, 1,957 tons were extracted, and 1,120 tons exported. There are many other deposits which only require capital and enterprise for their development.

This, however, is nothing in comparison to what is being done in the department of Constantine by a Glasgow firm, Messrs. Crookstone Brothers. Their quarries are situated in Djebel Dyr, about 15 kiloms. N.W. of Tebessa, at 1,500 metres altitude, where the deposits are said to be inexhaustible. I have not myself seen them, but I quote a description sent to me by the firm under date February 12, 1894:—

"The exportation of phosphates from this province has, up to the present, been comparatively unimportant, amounting in all to about 7,000 tons, all of which came from our mine. We are, however, busily engaged completing a branch railway of over 12 kiloms. in length, connecting the mines with the Bône-Guelma line at a point about 15 kiloms. before arriving at Tebessa. We expect to have this finished about April, when we will be able to turn out a very large quantity, say between 200 tons and 300 tons daily. The quality is very superior, being almost entirely free from iron and alumina, and its conversion into superphosphate has given, by all who have tried it, the most satisfactory results. The yield of tribasic phosphate of lime is between 60 per cent. and 70 per cent., and in this respect is not so rich as some of the phosphates at present being worked in the province of Oran, and which run from 70 per cent. to 85 per cent.

"The latter, however, are of limited extent, occurring principally in pockets or in grottoes, whereas the phosphate deposits of Tebessa occupy a very large area, with a continuous thickness of from 2 metres to 3 metres. If account be taken of seams less rich, say 45 per cent. to 50 per cent. of tribasic phosphate of lime, these deposits may be said to be inexhaustible, but the lower qualities cannot, at present prices, be worked profitably, and will therefore have to remain dormant for many years until the richer deposits are exhausted."

Another Scotch company, the Constantine Phosphate Company of Leith, has got a concession at Djebel Konif, 2,300 hectares in extent, for 36 years, at a yearly rent of 30 c. per ton. These are at 1,000 metres above the sea-level. The amount of phosphate there existing has been estimated at 40,000,000 tons, averaging 60 per cent. It will be necessary, however, to lay down a railway about 25 kiloms. in length, and when that is done 200 tons per diem can be extracted and sent off. It is calculated that the phosphates can be delivered in England at a cost of 27s. per ton, all costs included, which would seem to promise a fair margin of profit, if, as is maintained, it is saleable at 35s. per ton.

The whole of the tableland between Oran and Tunisia seems to abound with phosphates, more or less workable, which are full of bones and sharks' teeth, but owing to their softness it is impossible to pick them out entire.

The following tables marked A and B show the amounts of Exports and imports from Algeria for the years 1892 and 1893. Exports and imports for 1892-93.
The exports in which there is a marked increase are hides, wool, horns and hoofs, oats, oil-producing fruits, unmanufactured tobacco, flax-seed, tan bark, and alcohol.

The items in which there is a large diminution are, cattle, fish, wheat, barley, green vegetables, dry vegetables, potatoes, fresh and dry fruit, olive oil, alfa fibre, vegetable horse-hair, cork, forage and bran, iron ore, and wine. In fact, of all the articles which constitute the wealth of the colony.

This state of things is no doubt owing to the deplorable agricultural crisis which was common to the whole Mediterranean region during 1893, and indeed to many other parts of the Continent of Europe and even to America; more on this subject will be found in my agricultural report.

Amongst the articles imported into Algeria the chief items of increase are raw hides, wheat, barley, rice, potatoes, raw sugar, chicory, olive oil, oil made from seeds, sundry materials for building purposes, mineral oil, pottery, woollen tissues, paper, and metal work. Articles necessary to supply the deficiency in local production during a year of famine.

The decrease is most perceptible in lard, refined sugar, chestnuts, raw tobacco, wine, alcohol, glass and crystal, linen, jute, and cotton fabrics, machinery, and sparterie.

In a previous report I stated my conviction that the protective duties lately imposed would probably give rise to extensive
(1702) A 3

smuggling from Morocco and Tunisia. The figures in this table would indicate that my anticipation has been realised. Take, for instance, the item of cotton fabrics. It is impossible to import these by sea to any extent; the duties average from 250 fr. to 1,000 fr. per 100 kilos., whereas in Tunis they are only charged from 5 per cent. to 8 per cent. ad valorem. Nothing is easier than to send them to the south of that country, Gabes, for instance, and thence to transport them by camels to the south of Algeria.* Again in sugar, an article much used by the Arabs, there is a decrease of 1,250,000 kilos. in the quantity imported by sea; at Algiers it fetches in retail 1 fr. 10 c. per kilo., whereas it can be bought in the far interior for 70 c. This would be impossible without smuggling.

Table A.—EXPORTS from Algeria during the Years 1892–93.

Description of Goods.			1892	1893.	Difference	
					Increase.	Decrease.
Beasts of burden ...	Number	...	3,398	3,682	284	...
Cattle ...	...	...	925,984	789,696	...	136,288
Goats ...	...	...	287,948	258,736	19,688	...
Hides, raw ...	...	...	2,014,037	2,590,760	576,723	...
Wool ...	...	...	6,948,461	8,967,202	3,018,741	...
Silk ...	...	...	3,128	4,434	1,306	...
Wax ...	...	...	31,366	49,059	17,693	...
Fish ...	...	...	2,316,996	1,789,768	...	527,228
Coral, rough	...	...	19,868	18,266	...	1,602
Hones, horns, &c.	...	...	1,311,494	1,499,642	118,148	...
Cereals—						
Wheat ...	Quintals	...	794,435	829,391	...	465,044
Indian corn ...	...	...	2,815	22	...	2,793
Barley ...	...	...	764,426	388,761	...	375,665
Oats ...	...	...	204,758	400,556	195,798	...
Flour ...	...	...	27,623	8,535	...	19,088
Vegetables—						
Green ...	Kilos.	...	6,659,101	4,401,900	...	2,257,201
Dry ...	...	...	1,393,073	739,124	...	653,949
Potatoes ...	...	...	5,132,933	2,661,462	...	2,471,471
Canary seed	...	...	164,148	43,789	...	60,459
Fruit—						
Fresh ...	...	...	14,619,169	8,183,586	...	6,435,583
Dry ...	...	...	4,600,642	3,769,351	...	1,031,291
Oil-producing	...	...	40,883	197,761	157,868	...
Tobacco—						
Leaf ...	...	...	2,121,420	2,350,618	229,198	...
Manufactured	...	...	403,175	469,344	66,669	...
Oil—						
Olive ...	...	...	3,389,207	835,734	...	2,553,473
Seed ...	...	...	9,992	36,091	26,099	...
Flax—						
Seed ...	...	...	383,937	796,380	406,862	...
Stem ...	...	...	...	...	...	...
Cleaned	...	...	...	...	...	...
Reeds ...	...	...	9,099	31,323	22,224	...
Alfa fibre ...	...	...	83,658,544	68,967,298	...	14,591,246
Palm leaves ...	...	...	602	306	...	197
Vegetable horse-hair	...	...	21,699,832	21,342,110	...	357,722
Cork ...	...	...	10,664,433	10,308,207	...	356,226
Tan bark ...	...	...	11,111	12,111	1,000	...
Forage and bran	...	...	10,603,189	10,072,073	...	531,116
Rags ...	...	...	1,100,224	827,799	...	272,425
Lead ...	Quintals	...	189	1,605	1,467	...
Ore—						
Iron ...	...	...	3,994,670	2,710,039	...	1,184,631
Copper ...	...	...	5,968	475	...	5,493
Lead ...	...	...	124,959	67,636	...	57,323
Zinc ...	...	...	222,414	272,139	49,725	...
Wine ...	Litres	...	233,491,649	183,648,012	...	99,843,637
Alcohol ...	...	...	1,552,377	1,806,905	254,528	...
Hides, prepared	Kilos.	...	124,969	124,004	...	965

* This may explain the decrease of nearly 1,000,000 kilos. in the quantity of cotton goods imported during 1893.

Table B.—IMPORTS into Algeria during the Years 1892–93.

Principal Merchandise Imported.		1892.	1893.	Difference.	
				Increase.	Decrease.
Beasts of burden	Number	3,069	2,601	...	468
Cattle	"	120,915	104,200	...	16,715
Salt meat	Kilos.	904,584	839,807	...	64,777
Cheese	"	2,342,243	2,411,592	69,349	...
Butter	"	539,553	530,002	...	9,551
Lard	"	2,019,576	1,642,092	...	377,484
Hides, raw	"	608,744	883,816	275,072	...
Silk	"	80,210	22,231	...	7,979
Fish	"	1,892,615	1,946,143	53,528	...
Cereals—					
Wheat	Quintals	52,278	154,509	102,231	...
Indian corn	"	5,006	41,519	36,513	...
Barley	"	65,883	239,239	173,356	...
Oats	"	278	131	...	137
Flour	"	129,297	153,171	23,874	...
Rice	"	2,923,470	3,378,095	454,625	...
Potatoes	"	15,183,137	19,313,549	4,130,412	...
Vegetables, dried	"	8,396,317	8,334,506	...	61,811
Fruit—					
Dried	"	3,105,204	3,146,679	41,475	...
Oil-producing	"	936,500	847,354	11,354	...
Glucose	"	185,183	128,378	...	56,805
Sugar—					
Raw	"	2,382,927	2,625,601	242,674	...
Refined	"	12,906,092	11,654,216	...	1,251,876
Coffee	"	3,728,192	3,724,090	...	4,102
Chicory	"	300,183	405,221	105,038	...
Tea	"	22,568	27,125	4,557	...
Pepper	"	202,679	191,443	...	11,236
Chestnuts	"	1,104,984	911,720	...	193,264
Cinnamon	"	24,446	16,208	...	2,988
Nutmegs, vanilla, &c.	"	1,893	1,595	...	8,238
Cloves	"	26,087	22,985	...	3,102
Tobacco—					
Leaf	"	1,577,958	1,248,117	...	329,841
Manufactured	"	182,807	134,435	...	48,372
Oil—					
Olive	"	1,265,278	1,430,223	164,950	...
Seed	"	5,333,333	6,635,311	1,301,928	...
Wood for construction—					
Rough	1,000 kilos.	16,850	15,659	...	1,191
Sawn	"	27,942	28,489	...	543
Sundry materials	Kilos.	78,241,845	82,383,714	4,141,869	...
Coal	Quintals	1,479,008	1,887,538	...	91,170
Mineral oil—					
Raw	Kilos.	5,536	606	...	4,930
Refined	"	4,981,453	5,786,553	805,105	...
Fermented liquor—					
Common wine	Litres	9,846,220	9,730,195	...	116,025
Liqueurs	"	822,559	737,183	...	85,376
Alcohol	"	4,986,965	3,456,167	...	1,130,798
Beer	"	1,513,593	1,532,361	18,768	...
Pottery	Kilos.	3,127,479	8,068,320	2,940,841	...
Glass and crystal	"	4,280,451	3,880,860	...	399,601
Tissues—					
Linen and flax	"	636,148	431,652	...	204,496
Wool	"	2,995,482	2,692,451	...	403,031
Cotton	"	8,689,007	7,749,810	...	939,197
Wool	"	704,175	877,870	173,695	...
Silk	"	21,707	10,260	...	11,447
Others	"	15,491	23,788	8,297	...
Paper	"	4,164,457	4,843,520	679,063	...
Hides, prepared	"	1,582,780	1,598,211	15,431	...
Machinery	"	4,274,925	2,836,690	...	1,438,235
Metal work	"	11,273,184	11,927,475	674,291	...
Sparterie, rope, &c.	"	1,092,860	989,551	...	103,299

Tables C to F, showing the value and distribution of trade, require no explanatory remarks.

Table C.—VALUE of Exports to Foreign Countries from Algeria.

Articles.	1872.	1882.	1888.	1890.	1891.	1892.
Cereals ..	8,814,292	20,542,212	1,108,420	9,791,496	3,581,845	2,603,694
Live stock ..	964,092	4,774,378	1,626,254	1,091,565	2,295,711	315,933
Tobacco, manufactured ..	1,393,551	685,700	1,226,441	973,413	2,292,132	2,432,376
Cattle, empty ..	417,473	585,223	163,473	154,467	152,889	264,904
Cotton fabrics ..	1,699,839	61,087	55,000	33,806	62,484	44,932
Wool ..	175,970	477,815	315,533	41,087	89,627	5,005
Woollen fabrics ..	402,625	8,771	22,478	17,824	56,310	4,063
Wax, bees ..	40,889,725	11,045,525	7,358,500	6,576,431	6,676,671	6,518,261
Alfa fibre ..	281,000	105,994	324,475	61,268	889,903	1,959,250
Hides, undressed ..	36,393	3,742,363	300,593	643,004	1,294,333	160,000
Stallions ..	7,500	285,000	135,000	216,000	140,000	5,183
Tobacco, leaf ..	239,561	279,773	925,949	33,867	121,361	179,823
Hides, dressed ..	15,962	1,175,907	1,006,251	32,923	69,373	6,806
Linum fabrics ..	13,221	48,001	22,947	151,656	461,317	364,155
Forage ..	116,528	385,722	287,840	33,597	24,795	8,867
Wax, bees ..	55,082	6,763	12,556	10,947	8,594,219	3,712,395
Cork, rough ..	222,572	984,292	2,656,382	3,597,318	3,954,366	3,115,233
Iron ore ..	5,398,23	5,821,377	4,034,714	4,741,416	2,128,517	1,732,697
Lead ..	10,484	466,439	6,538,381	1,572,393	91,362	15,920
Copper ore ..	268	13,873,555	39,64936	111,224	274,374	238,652
Clothing ..	824,722	144,125	636,350	261,270	1,014,552	450,676
Fish ..	1,411,420	1,161,002	1,256,806	1,749,872	1,014,552	461,143
Tan bark ..	818,067	1,891,963	754,385	886,433	652,497	165,761
Silk fabrics ..	15,100	51,712	90,113	11,462	50,189	19,952
Olive oil ..	44,167	6,086	6,029	11,928	69,809	1,020,944
Vegetable horse-hair ..	2,812,014	3,178,371	1,576,929	1,408,709	1,321,751	60,455
Potatoes and dry vegetables ..	1,092,849	440,102	264,148	281,882	245,367	6,085,813
Other articles ..	2,150,061	2,862,849	4,423,696	3,941,771	4,227,714	32,856,498
Total francs ..	68,809,459	76,579,555	33,254,943	40,428,509	36,112,662	1,313,419
Equiv. in sterling ..	2,732,378	3,022,992	1,330,198	1,617,140	1,445,682	52,856

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Table D.—VALUE of Imports from Foreign Countries into Algeria—continued.

Articles.	1872.	1882.	1888.	1889.	1890.	1891.	1892.
	France.	France.	France.	France.	France.	France.	France.
Mercury	..	..	..	91,750	69,912	80,234	47,689
Salt meat	..	..	59,099	..	..	..	..
Grease	..	..	..	95,358	64,759	79,818	..
Nees	..	..	131,409	..	..	10,380	..
Furniture	..	..	..	..	..	..	..
Rosin	..	..	..	..	..	..	..
Live stock	200,000	300,000	3,098,914	5,934,883	10,830,913	8,297,747	5,971,521
Hart, goats, and horse	..	..	..	..	..	..	..
Iron and steel, manufactured ..	3,500,000	4,100,000	687,431	782,069	768,557	824,905	790,467
Leather, manufactured	90,000	100,000	213,203	302,026	243,296	..	130,373
Oil, seed	600,000	1,300,000	17,599	7,269	39,529	112,206	808,815
Machinery	200,000	2,300,000	545,667	591,762	722,185	1,928,291	11,945,199
Other articles	11,300,000	22,000,000	8,418,665	10,185,941	11,046,430	9,082,064	..
Total francs	58,500,000	67,200,000	54,391,544	58,754,576	65,726,082	61,929,108	63,437,284
Equiv. in sterling	£ 2,240,000	3,138,000	2,175,674	2,350,183	2,619,011	2,469,164	2,537,491

The distribution of this trade amongst the various foreign countries dealing with Algeria is shown in Table II.

Table E.—VALUE of the Trade between Algeria and other Countries from: 1872 to 1892.

IMPORTS.

Countries.	1872.		1882.		1888.		1889.		1890.		1891.		1892.	
	Francs.		Francs.		Francs.		Francs.		Francs.		Francs.		Francs.	
French entrepôt	18,700,000	..	41,600,000	..	16,300,000	..	14,700,000	..	16,000,000	..	24,233,815	..	25,092,142	..
Sweden ..	800,000	..	1,000,000	..	1,000,000	..	1,000,000	..	1,686,000	..	1,741,371	..	991,268	..
Norway ..	100,000	..	1,300,000	..	100,000	..	300,000	..	334,000	..	510,978	..	256,598	..
Belgium ..	..	..	800,000	..	200,000	..	300,000	..	320,000	..	12,060,328	..	8,937,702	..
Great Britain ..	22,800,000	..	10,700,000	..	8,200,000	..	11,200,000	..	10,888,000	..	1,327,481	..	1,975,961	..
Austria ..	1,000,000	..	900,000	..	1,800,000	..	1,700,000	..	2,089,000	..	11,922,072	..	10,742,929	..
Spain ..	6,500,000	..	11,900,000	..	8,500,000	..	8,200,000	..	7,443,000	..	946,184	..	1,389,133	..
Italy ..	2,600,000	..	2,700,000	..	2,100,000	..	1,100,000	..	1,077,000	..	1,025,149	..	1,591,939	..
Turkey ..	600,000	..	4,900,000	..	1,100,000	..	1,300,000	..	726,000	..	426,187	..	455,685	..
Egypt ..	..	..	..	..	100,000	..	100,000	..	452,000	..	18,264,180	..	16,525,732	..
Barbary States..	4,300,000	..	4,600,000	..	8,600,000	..	15,200,000	..	22,076,000	..	6,050,623	..	..	..
Other countries	1,100,000	..	6,800,000	..	6,200,000	..	3,700,000	..	3,186,000	..	78,508,268	..	67,909,083	..
Total francs ..	58,500,000	..	87,200,000	..	54,400,000	..	58,800,000	..	65,226,000	..	3,140,330	..	2,716,363	..
Equiv. in sterling	2,340,000	£	3,438,000	£	2,160,000	£	2,352,000	£	2,609,040	£	..	..	..	..

Table F.—VALUE of the Trade between Algeria and other Countries from 1872 to 1892.

Countries.		1872.	1882.	1888.	1889.	1890.	1891.	1892.
		Francs.	Francs.	Francs.	Francs.	Francs.	Francs.	Francs.
Belgium ..	..	1,700,000	1,700,000	8,100,000	2,800,000	3,067,000	2,426,143	4,184,566
Great Britain ..	..	44,100,000	36,600,000	11,700,000	13,700,000	19,725,000	15,408,724	14,207,407
Portugal ..	..	300,000	300,000	200,000	500,000	597,000	152,009	133,492
Spain ..	..	14,600,000	15,400,000	4,000,000	3,700,000	6,897,000	7,152,037	3,777,000
Italy ..	..	3,100,000	3,500,000	1,500,000	1,100,000	1,721,000	3,222,007	2,648,887
Barbary States..	..	700,000	2,100,000	2,900,000	2,600,000	1,604,000	2,670,006	2,473,946
Other countries ..	..	3,800,000	5,200,000	4,900,000	4,800,000	6,607,000	13,777,279	15,429,304
Total francs ..	..	67,300,000	52,000,000	33,300,000	29,000,000	40,428,000	44,820,083	43,918,050
Equiv. in sterling ..	£	2,732,000	2,080,000	1,332,000	1,160,000	1,617,120	1,792,802	2,080,722

But the most interesting of the series are Tables G and H, showing the nature and extent of commercial relations between Great Britain and Algeria.

Table G.—VALUE of the Trade between Algeria and Great Britain between 1872 and 1892, including British Possessions in the Mediterranean.

IMPORTS INTO ALGERIA.

Articles.	1872.		1882.		1888.		1889.		1890.		1891.		1892.	
		Francs.		Francs.		Francs.		Francs.		Francs.		Francs.		Francs.
Cotton goods	..	19,200,000	..	6,800,000	..	5,100,000	..	6,200,000	..	5,980,000	..	7,183,122	..	4,796,494
Coal	..	700,000	..	1,600,000	..	1,400,000	..	2,800,000	..	2,471,000	..	3,688,279	..	3,567,406
Tobacco, raw	..	300,000	..	..	..	6,000	..	15,000	..	84,000	..	..	..	12,630
„ manufactured	..	200,000	..	300,000	..	437,000	..	300,000	..	363,000	..	589,162	..	292,895
Iron and steel	..	100,000	..	..	..	24,000	..	30,000	..	20,000	..	..	..	27,020
Woollen fabrics	..	100,000	..	..	..	105,000	..	60,000	..	51,000	..	78,557	..	802,198
Other articles	..	2,200,000	..	2,700,000	..	1,129,000	..	1,795,000	..	1,969,000	..	849,819	..	..
Total francs	..	22,800,000	..	10,800,000	..	8,200,000	..	11,200,000	..	10,888,000	..	12,470,989	..	9,498,643
Equiv. in sterling	£	912,000	..	432,000	..	328,000	..	443,000	..	435,520	..	498,839	..	389,945

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Table H.—VALUE of the Trade between Algeria and Great Britain between 1872 and 1892, including British Possessions in the Mediterranean.

EXPORTS FROM ALGERIA.

Articles	1872.	1882.	1888.	1889.	1890.	1891.	1892.
	France.	France.	France.	France.	France.	France.	France.
Alfa fibre ..	31,900,000	9,300,000	6,700,000	5,100,000	6,415,000	6,137,039	6,057,411
Cereals ..	3,900,000	1,700,000	500,000	2,100,000	6,081,000	2,562,421	2,584,179
Tobacco, manufactured ..	900,000	..	400,000	400,000	342,000	272,892	172,118
Vegetable horse hair ..	1,600,000	100,000	50,000	30,000	94,000	68,974	89,825
Agricultural seed ..	600,000	..	..	..	..	..	..
Cotton goods ..	200,000	..	..	..	..	..	..
Woollen fabrics ..	200,000	..	..	..	..	..	..
Oil-seed ..	..	700,000	..	..	..	117,450	136,800
Live stock ..	200,000	..	170,000	..	..	..	..
Wool ..	..	..	..	..	..	..	..
Mats, &c. ..	..	13,900,000	70,000	360,000	141,000	39,932	1,384,091
Copper ore ..	..	2,400,000	1,200,000	2,150,000	2,417,000	1,448,100	1,651,204
Iron ..	..	500,000	1,080,000	1,430,000	2,009,000	2,012,165	2,225,363
Lead ..	..	1,500,000	1,580,000	2,180,000	2,190,000	3,273,863	..
Other articles ..	4,600,000	1,500,000	1,580,000	2,180,000	2,190,000	3,273,863	..
Total francs ..	24,100,000	39,104,000	11,700,000	13,700,000	19,725,000	15,923,336	14,299,381
Equiv. in sterling ..	£ 964,000	1,204,000	468,000	548,000	780,000	636,943	571,871

It is still too soon to ascertain exactly the effect of the new British trade tariff (of February 1, 1892) on British trade with Algeria. The statistics showing the value of imports and exports and their distribution have not been published beyond 1892. In that year the imports from the United Kingdom to Algeria fell short of those during 1889 and 1890 by 59,000*l.* and 45,575*l.* respectively. Those during 1891 prove nothing, as there was a rush to get goods into the country before the tariff came into operation. The exports from Algeria also were less than during either of the two previous years.

Table I.—TABLE showing the amount of Exports and Imports at the various Ports during the Years 1889-92.

Ports.	1889.		1890.		1891.		1892.	
	Exports.	Imports.	Exports.	Imports.	Exports.	Imports.	Exports.	Imports.
Nemours ..	17,938,152	5,442,084	France.	France.	France.	France.	France.	France.
Boni-Saf ..	4,175,759	277,555	2,694,960	436,258	811,322	494,111	494,111	1,463,241
Mers-el-Kebir ..	448,670	134,008	4,991,391	169,472	4,288,350	4,124,883	4,124,883	61,522
Oran ..	51,384,249	74,574,779	184,008	568,896	38,873	41,214	451,113	451,113
Alger ..	7,821,747	3,602,215	72,743,981	75,080,763	60,946,940	62,295,280	66,257,414	66,257,414
Mostaganem ..	5,152,551	5,241,610	8,486,497	2,940,999	8,746,333	9,544,343	37,485	37,485
Ténés ..	218,910	51,793	5,375,456	5,431,442	5,366,933	6,446,653	10,331,583	10,331,583
Cherchell ..	30,649	42,450	52,843	54,153	61,760	68,448	28,647	28,647
Algiers ..	75,980,323	89,705,171	9,000	99,421	22,880	29,449	66,323	66,323
Bône ..	5,535	331,237	74,260,350	113,144,573	77,005,085	87,437,643	105,955,184	105,955,184
Bougie ..	2,732,307	8,406,597	1,239,492	355,846	161,365	259,438	886,367	886,367
Djagelly ..	1,532,555	358,575	4,797,852	8,825,413	3,10,312	9,654,263	7,446,940	7,446,940
Collo ..	1,735,483	162,908	1,256,159	384,093	1,881,097	2,744,221	946,922	946,922
Stora ..	472,406	20,325	815,924	197,403	1,042,070	1,769,410	139,036	139,036
Philippeville ..	36,575,836	80,685,342	49,967,388	32,117	428,192	441,472	72,993	72,993
Bône ..	41,964,951	18,581,736	41,150,356	38,646,125	44,672,697	30,199,843	56,411,837	56,411,837
La Calle ..	2,732,337	958,075	3,431,676	19,874,081	24,555,571	43,397,197	21,042,583	21,042,583
Total France ..	251,457,723	239,114,508	272,838,949	261,844,734	245,275,602	251,055,126	257,597,775	257,597,775
Equiv. in sterling ..	£ 10,958,299	£ 9,954,580	£ 11,918,558	£ 10,472,189	£ 9,531,423	£ 10,912,245	£ 10,866,601	£ 10,866,601
Combined totals ..	490,571,331	534,643,983	534,643,983	534,643,983	534,643,983	534,643,983	534,643,983	534,643,983
Equiv. in sterling ..	£ 19,022,849	£ 21,885,747	£ 21,885,747	£ 21,885,747	£ 21,885,747	£ 21,885,747	£ 21,885,747	£ 21,885,747

The total amount of customs dues levied on importations during 1892 amounted to 10,052,756 fr. (402,110*l.*), almost the same amount as in 1891, in spite of the immense decrease in the total value of the imports.

To this may be added the various land custom-houses, the exports and imports through which, during 1891, were :—

Table J.—VALUE of Merchandise at the various Land Custom-houses.

Custom-houses.	Exports.	Imports.
	Francs.	Francs.
Gar-Rouban	..	..
Nedromah	..	294,481
Lalla Maghnia	..	4,072,514
Constantine	..	3,976,481
Roum-es-Souk	..	159,684
Souk Ahras	..	568,067
Ghardimaou	159,921	1,861,947
Tebessa	..	505,012
Aiounet-ed-Diab	..	2,398
Biskra	..	1,436
El-Oued	..	115,254
Total francs	159,921	1,857,274
Equiv. in sterling ..	6,397 <i>l</i> .	74,291 <i>l</i> .

In Table V of last year's report I gave the total amount of British shipping which visited the Port of Algiers during 1892. I now supplement this by another table showing the various ports of the United Kingdom from which the vessels came and to which they went. The cargoes imported consisted of little more than coal. The goods exported were chiefly vegetable horse-hair, alfa fibre, cork, and wine.

Table K.—RETURN of the Principal Articles of Imports and Exports during the Year 1893.

Ports.	Entered.			Left.		
	Number of Vessels.	Tons.	Cargoes.	Number of Vessels.	Tons.	Cargoes.
Liverpool ...	66	95,522	Cotton goods, agricultural machinery, hardware	4	6,318	Wine, cork, vegetable horse-hair, and alfa
London ...	1	610	Cotton goods, agricultural machinery, hardware	9	12,617	Wine, cork, vegetable horse-hair, and alfa
Cardiff ...	63	57,648	Coal	...	...	...
Newcastle ...	11	11,456	"	2	2,406	...
Swansea ...	14	12,497	"	...	...	...
Newport ...	24	21,921	"	1	610	Vegetable horse-hair and alfa
Glasgow ...	4	2,513	Coal and hardware	8	6,967	...
Other British ports	5	4,172	...	3	3,750	...
Total ...	188	206,339	...	27	32,668	...

Naturaliza-
tion.

The recent nationality laws in France have had the effect not only of causing many British subjects in Algeria to lose their original nationality, but have induced a considerable number more to apply voluntarily for French naturalization. 109 obtained this during 1892, the number in the previous year having been only 65. Between January 1 and October 1, 1893, the applications submitted to the same effect numbered 111.

All the applicants were Maltese.

Maritime
colonies.

Great efforts are being made to implant French maritime colonies on the coast of Algeria. Invitations have been sent to all the "circonscriptions maritimes" in France to the sea-faring population to come and settle here, and pecuniary assistance has been freely offered to assist them on their arrival.

But the conditions of life and the methods of fishing in the Mediterranean are so essentially different to those on the Atlantic coast of France, that it is very doubtful whether the scheme can prove successful.

Tables L to Z show the amount of shipping at the various ports of Algeria during the year 1893.

Table L.—ARRIVALS and Departures of Vessels at and from La Calle during 1893.

Nationality.	Arrivals.						Departures.					
	With Cargoes.			In Ballast.			With Cargoes.			In Ballast.		
	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.
French ..	54	83,979	2,271	7	79	27	7	1,193	74	10	490	45
British ..	..	..	..	4	4,136	85	1	1,288	26	..	..	..
Austrian ..	..	..	..	1	76	6	2	152	12	..	..	..
Italian ..	10	337	49	3	148	17	10	391	51	1	21	5
Greek ..	8	1,878	60	..	..	..	1	212	7	7	1,666	53
Tunisian ..	2	24	11	4	12	12	3	9	9	2	13	7
Total ..	74	86,218	2,391	19	4,451	147	24	3,245	179	20	2,190	110

Table M.—ARRIVALS and Departures of Vessels at and from the Port of Bône during 1893.

Nationality.	Arrivals.						Departures.					
	With Cargo.			In Ballast.			With Cargo.			In Ballast.		
	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.
French ..	286	169,87	9,452	25	5,659	365	328	201,058	11,318	9	2,083	121
Russian ..	3	543	18	..	..	..	1	324	8	1	519	10
Swedish ..	3	2,339	60	..	268	9	3	1,616	46	..	..	..
Norwegian ..	5	2,174	62	1	98	18	3	2,159	54	..	..	..
Danish ..	4	3,583	91	2	3,137	66	2	1,788	44	1	1,020	24
British ..	..	..	154	16	21,256	399	23	26,445	564	4	3,414	76
Belgian ..	9	6,720	154	16	10,035	202	7	7,284	149	..	..	..
..	4	4,020	79	9	..	..	1	923	8	2	668	19
Austrian ..	4	2,036	60	..	..	..	39	3,783	265	2	406	14
Italian ..	22	1,888	115	14	1,701	100	15	192	96	1	12	7
Tunisian ..	13	160	84	1	10	3	..	515	20	2	562	15
Greek ..	4	879	29	..	..	..	3	..	..	..	..	..
Total	357	106,476	10,272	75	42,485	1,153	431	247,177	12,616	22	8,654	285

The commerce of Philippeville continues to decrease. In the total number of vessels leaving with cargoes there is a decrease of 63 vessels, aggregating 46,762 tons, and of British shipping 14 vessels and 18,603 tons. The cause of this is to a certain extent the bad harvest of 1892-93, but chiefly the application of the Law of April 2, 1889, which reserves to the French flag all transport between Algeria and France. English vessels can no longer take the barley of Philippeville to Dunkirk as they formerly used to do.

Table O.—ARRIVALS and Departures of Vessels at and from the Port of Stora during 1893.

Nationality.	Arrivals.			Departures.			
	With Cargoes.		In Ballast.	With Cargoes.		In Ballast.	Number of Crews.
	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Ships.	
Italian ..	5	219	32	4	164	2	12
Greek ..	..	..	..	1	393	..	..
Total ..	5	219	32	5	557	2	12

Table P.—ARRIVALS and Departures of Vessels at and from the Port of Collo during 1893.

Nationality.	Arrivals.			Departures.			
	With Cargoes.		In Ballast.	With Cargoes.		In Ballast.	Number of Crews.
	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Ships.	
French ..	..	..	..	1	788	..	..
Russian ..	..	..	..	..	..	..	..
Danish ..	..	..	133	9	8,704	..	..
British ..	..	..	..	1	1,001	..	..
Swedish..	..	..	..	2	1,064	..	..
Tunisian ..	1	10	5	..	..	..	..
Total ..	1	10	5	13	11,557	..	..

Table Q.—ARRIVALS and Departures of Vessels at and from the Port of Djidjelli during 1893.

Nationality.	Arrivals.						Departures.					
	With Cargoes.			In Ballast.			With Cargoes.			In Ballast.		
	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.
Italian ..	2	62	16	18	914	113	7	881	48	13	148	76
Tunisian ..	3	42	19	..	..	..	..	..	..	..	..	..
British ..	2	1,487	40	1	1,224	22	2	1,715	87	..	..	..
Spanish ..	1	415	19	..	..	..	1	415	19	..	..	..
Total ..	8	2,006	94	19	2,138	135	10	3,011	104	13	148	76

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Table R.—ARRIVALS and Departures of Vessels at and from the Port of Bougie during 1893.

Nationality.	Arrivals.						Departures.					
	With Cargoes.			In Ballast.			With Cargoes.			In Ballast.		
	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.
French ..	7	4,605	159	2	28	10	53	38,314	2,553	3	3,089	110
Swedish ..	1	287	8	..	..	..	..	..	..	..	494	10
Norwegian ..	1	494	10	..	..	..	..	..	..	1	1,978	48
British ..	4	2,722	65	..	..	..	1	772	18	3	633	9
Austrian ..	1	223	8	..	..	..	1	287	9	1	36	11
Italian ..	1	49	5	5	281	32	..	..	..	2	..	..
Tunisian ..	3	70	18	..	..	..	..	..	..	..	..	..
Greek ..	1	877	9	..	..	..	..	..	..	1	877	9
Total ..	19	8,827	282	7	304	42	55	39,373	2,580	11	6,507	197

Table S.—ARRIVALS and Departures of Vessels at and from the Port of Algiers during 1893.

Nationality.	Arrivals.						Departures.					
	With Cargoes.			In Ballast.			With Cargoes.			In Ballast.		
	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.
French ..	610	298,572	24,710	21	8,908	327	611	896,231	24,616	21	12,537	469
Russian ..	3	1,704	48	..	..	..	3	1,704	48	..	..	..
Swedish ..	6	3,789	108	..	..	..	2	1,388	39	2	1,607	40
Norwegian ..	15	7,477	283	..	..	..	9	5,472	142	8	4,823	124
Danish ..	19	20,225	450	..	..	..	20	21,086	476	..	..	..
British ..	192	216,251	4,726	6	7,658	293	84	198,759	2,589	87	91,892	1,923
German ..	13	19,982	1,068	1	1,007	23	14	20,404	1,097	1	997	22
Dutch ..	25	32,282	912	..	..	..	24	30,655	871	..	..	..
Belgian ..	1	1,325	23	..	..	..	1	1,325	23	..	..	..
Spanish ..	88	12,048	986	7	1,062	79	85	10,970	934	11	2,902	165
Austrian ..	31	25,957	648	2	1,369	35	26	22,774	568	6	4,235	162
Italian ..	34	9,088	338	7	2,086	70	19	4,806	192	13	4,663	132
Greek ..	5	3,827	96	..	..	..	2	764	26	4	8,312	78
Turkish ..	1	1,206	23	..	..	..	1	1,206	23	..	..	..
Total ..	1,045	754,011	34,869	44	22,100	826	901	627,074	31,641	153	126,768	2,909

As Algiers has become such an important coaling station for British vessels, an official description of the port may not be out of place. This has been published by the Chamber of Commerce in a lithographed volume, which however is not accessible to the general public.* I subjoin an epitome of it.

Description of
the port of
Algiers.

This port which consists of a single great sheet of water and a small basin, called the Darse, has a quadruple character:

1. It is a military harbour.

The Darse is entirely reserved for the marine and has several buoys in the south portion with a "stationnaire" always present there. This portion of the harbour is not considered officially as a military port, but the Minister of Marine has issued orders for it being always kept for the use of the navy.

2. It is a fishing port; there are 412 fishing boats, 3 of which are steamers, and 1,358 men are engaged in this industry.

3. It is a harbour of refuge.

4. It is a mercantile port and takes the eighth place amongst the harbours of France.

It ought, in the opinion of the Chamber of Commerce, to have a double future:

1. As a port of repairs, if not of construction, as it contains two docks which are not yet sufficiently used.

2. As a port of supply for English vessels going towards the east; in this respect it has wonderfully increased in importance of late.

The three first characters require a great surface of water; the fourth a great extent of quay. The surface contains 89 hectares (222½ acres), a superficies sufficient for its requirements, but the length of its quays is by no means equal to the demands of commerce. There are only 1,280 metres of quay available for a tonnage of 746,993 tons, or 583 tons of merchandise for every metre of quay.

The commerce of the port of Algiers contains two items which greatly encumber the quays. The exportation of wine which necessitates the return of empty casks, and the large stocks of coals which have to be kept up by the various firms engaged in supplying the vessels which arrive to take in coal here.

The following works are necessary to make the harbour as safe and commodious as it ought to be:

1. The actual entrance should be narrowed, and another one made in the south part of the mole. The work is estimated at 800,000 fr. (32,000*l.*) and is actually in progress.

2. The crowning part of the northern jetty should be replaced by better work; this also is in progress and will cost 340,000 fr. (13,000*l.*).

3. The retaining walls of the admiralty "îlot" require to be renewed. A credit for executing this has not yet been granted.

4. The northern jetty should be widened.

5. The same jetty should be lengthened.

* Statistique des ports Maritimes de Commerce. Année, 1892. Port d'Alger. Alger folio, pp. 68.

These two propositions have been approved by a nautical commission. But even these improvements are not sufficient for the requirements of the marine. The engineers are at present considering—

6. A project for creating an inner harbour in the bay to the east. This is being taken into consideration by the competent authorities.

In the meantime the Chamber of Commerce has solicited permission to erect sheds on the south terre-plein of the fort, independent of anything that the Government may decide on doing, and it has purchased two new cranes for erection there. The railway company (Paris-Lyons-Mediterranean) has applied for permission to construct lines on the new quay for improving the circulation around the harbour.

Lastly the lighting of the port has been improved by placing two luminous buoys at the entrance.

Algiers as a
coaling
station.

Formerly vessels going to and returning from the east used to stop at Gibraltar and Malta to coal. Now Algiers has been found a much more convenient stopping place, as it divides the distance better between Port Said and the United Kingdom, and it is free from the unusually strict quarantine regulations which frequently are enforced at our own Mediterranean ports. Two mercantile houses at Algiers, Messrs. Burke and Delacroix and M. Prosper Durand, representing Strick and Co. of Cardiff, made great efforts to induce vessels to call here, and their success caused other firms to open branches at Algiers to participate in the business, the most important of which is Worms, Josse, and Co.

The following statement shows the number of British vessels which called here for coal only, exclusive of those which brought or took away cargoes from 1886-93 :—

Year.						Number of Vessels.
1886..	..	..	..	..	..	85
1887..	..	..	..	..	..	103
1888..	..	..	..	..	..	130
1889..	..	..	..	..	..	225
1890..	..	..	..	..	..	263
1891..	..	..	..	..	..	386
1892..	..	..	..	..	..	657
1893..	..	..	..	..	..	1,118

The number continues to increase every day; now five or six vessels are often in harbour at once.

Dues on
shipping at
Algiers.

It may be of service to those connected with the mercantile marine to know exactly the costs which vessels arriving at Algiers have to pay. Supposing a ship of 1,000 tons burden arrives here with a cargo of 2,000 tons of coal, the charges are as follows :—

Charges.	Amount.	
	Currency.	Sterling.
	Fr. c.	£ s. d.
Pilotage, 3 c. per ton net	30 0	1 4 0
Mooring	10 0	0 8 0
Sanitary dues, 10 c. per ton net ..	100 0	4 0 0
Customs tax, called Péage, 15 c. per ton of goods landed	150 10	6 0 1
Quay duties, 50 c. per ton	500 10	20 0 1
Stamp duties	1 30	0 1 1
Fixed remuneration to shipbroker	40 10	1 12 1
Landing cargo, 2,000 tons at 1 fr. 25 c. .	2,500 0	100 0 0
Total	3,331 60	133 5 4

As a general rule, vessels after discharging their cargoes leave Algiers in ballast to seek freight elsewhere. Some few, however, do load for foreign ports, rarely for the United Kingdom, and never for France. In such cases the costs are as before given with the following additions:—

Charges.	Amount.	
	Currency.	Sterling.
	Fr. c.	£ s. d.
Charges as before given	3,331 60	133 5 4
Loading, say, 1,500 tons of mineral ore at 50 c per ton	750 0	30 0 0
And 500 tons of lighter cargo at 1 fr. per ton ..	500 0	20 0 0
Total	4,581 60	183 5 4

Supposing a vessel, say of 1,000 tons net burden, calling at Algiers to discharge only part of its cargo, say 100 tons, the charges would be:—

Charges.	Amount.	
	Currency.	Sterling.
	Fr. c.	£ s. d.
Pilotage	30 0	1 4 0
Mooring	10 0	0 8 0
Sanitary dues	100 0	4 0 0
Péage	18 75	0 15 0
Quay dues	50 10	2 0 1
Stamp duty	1 30	0 1 1
Shipbroker.. .. .	40 0	1 12 1
Landing 100 tons	125 0	5 0 0
Total	375 15	15 0 8
Should the ship embark 50 tons at 1 fr. ..	50 0	2 0 0
In this case the péage would be augmented $\frac{1}{10} = \frac{1 \text{ fr. } 0}{10}$	9 35	0 7 6
Total	434 50	17 7 9

Should, however, the vessel arrive from any port out of Europe, say from India, to land 100 tons of cargo, the following would be the charges :—

Charges.	Amount.	
	Currency.	Sterling.
	Fr. c.	£ s. d.
Pilotage	30 10	1 4 1
Mooring	10 0	0 8 0
Sanitary dues at 15 c. per ton	150 10	6 0 1
Péage	18 75	0 15 0
Quay dues at 1 fr. per ton	100 25	4 0 2½
Stamp duty	1 30	0 1 0½
Shipbroker.. .. .	40 10	1 12 1
Landing cargo	125 0	5 0 0
Total	475 60	19 0 6
Should the vessel take 50 tons of cargo.. ..	50 0	2 0 0
Péage	9 35	0 7 6
Total	534 95	21 8 0

Instead of coming from the far East, suppose the ship came from another port in the Mediterranean, she would pay :—

Charges.	Amount.	
	Currency.	Sterling.
	Fr. c.	£ s. d.
Pilotage	30 10	1 4 1
Mooring	10 0	0 8 0
Sanitary dues	100 10	4 0 1
Péage on one-eighth of burden	18 75	0 15 0
Stamp duty	1 30	0 1 0½
Shipbroker	40 0	.. ..
Landing 100 tons	100 0	4 0 0
Total	300 20	12 0 2

Should a vessel only call for coal, the charges would be :—

Charges.	Amount.	
	Currency.	Sterling.
	Fr. c.	£ s. d.
Pilotage	30 10	1 4 1
Stamp duty	1 30	0 1 0½
Mooring	10 0	0 8 0
“ Rapport de Mer ”	12 50	0 10 0
Shipbroker	20 0	0 16 0
Total	73 90	2 19 1½

Table F.—ARRIVALS and Departures of Vessels at and from the Port of Ténés during 1893.

Nationality.	Arrivals.			Departures.		
	With Cargoes.		In Ballast.	With Cargoes.		In Ballast.
	Number of Ships.	Tonnage, of Crews.	Number of Ships.	Number of Crews.	Number of Ships.	Number of Crews.
Spanish..	2	92	13	..	3	19
Total ..	2	92	13	..	3	19
					1	46
					1	6
					1	6

Table U.—ARRIVALS and Departures of Vessels at and from the Port of Mostaganem during 1893.

Nationality.	Arrivals			Departures		
	With Cargoes.		In Ballast.	With Cargoes.		In Ballast.
	Number of Ships.	Tonnage, of Crews.	Number of Ships.	Number of Crews.	Number of Ships.	Number of Crews.
French ..	11	5,189	289	4	13	262
Russian ..	1	397	8	..	1	20
Neapolitan ..	1	995	19	..	..	..
Belgian ..	1	611	14	..	..	..
Austrian ..	1	725	15	..	..	..
German ..	1	..	..	..	1	15
Total ..	15	7,627	295	4	13	282
					4	1,634
					58	..

Table V.—ARRIVALS and Departures of Vessels at and from the Port of Arzeu during 1893.

Nationality.	Arrivals.						Departures.					
	With Cargoes.			In Ballast.			With Cargoes.			In Ballast.		
	Number of Ships.	Number of Crews.		Number of Ships.	Number of Crews.		Number of Ships.	Number of Crews.		Number of Ships.	Number of Crews.	
		Tonnage.			Tonnage.			Tonnage.			Tonnage.	
French ..	9	3,226	176	8	3,981	136	24	12,198	504	3	1,178	31
Swedish..	1	254	8	..	..	..	1	461	14	1	254	8
British ..	5	3,615	85	10	9,363	205	6	5,880	129	5	8,515	85
Spanish ..	2	68	15	1	997	27	2	1,086	35	1	29	7
Italian ..	..	..	..	2	599	16	1	174	7	..	..	..
Total ..	17	7,063	284	21	14,880	384	34	19,749	689	10	4,974	131

FRANCE.

Table W.—ARRIVALS and Departures of Vessels at and from the Port of Oran during 1893.

Nationality.	Arrivals.						Departures.					
	With Cargoes.			In Ballast.			With Cargoes.			In Ballast.		
	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.
French ..	572	109,492	19,211	6	1,729	87	134	387,955	18,266	11	1,057	108
Russian ..	1	780	13	1	369	11	2	646	18	1	780	15
Swedish ..	2	1,664	33	..	..	..	4	2,281	66	1	688	12
Norwegian ..	12	7,571	194	..	..	..	8	3,114	132	5	2,306	63
Danish ..	..	..	..	..	..	..	1	943	23	..	..	..
British ..	63	54,837	1,269	33	26,735	628	107	88,767	2,024	11	7,051	182
German ..	10	8,782	206	..	..	..	10	9,203	217	..	..	..
Belgian ..	8	9,866	190	..	..	..	17	21,168	403	..	..	..
Portuguese ..	4	28	31	2	103	17	7	139	56	..	..	..
Spanish ..	284	52,901	4,094	41	6,706	541	255	48,277	8732	65	11,298	871
Austrian ..	10	3,629	97	3	1,730	45	10	3,395	105	4	1,836	60
Italian ..	5	2,577	63	15	2,398	120	23	5,955	269	1	1,237	25
Greek ..	2	1,531	85	..	..	..	..	..	..	1	579	17
Morocco ..	..	..	..	..	..	..	..	..	..	4	89	25
Total ..	973	453,116	25,438	101	40,428	1,449	983	572,097	26,275	100	26,740	1,341

Table X.---ARRIVALS and Departures of Vessels at and from the Port of Mers-el-Kebir during 1893.

Nationality.	Arrivals.						Departures.					
	With Cargoes.			In Ballast.			With Cargoes.			In Ballast.		
	Number of Ships.	Tonnage	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.
French ..	9	1,920	80	5	1,209	44	3	259	24	7	2,532	79
British ..	3	129	11	17	1,863	83	9	387	33	10	430	38
Spanish ..	..	..	..	2	118	13	..	..	..	2	118	13
Italian ..	5	2,401	58	..	..	..	..	..	..	4	1,862	44
Austrian ..	..	..	..	1	463	11	..	..	..	..	..	..
Total ..	17	4,450	149	25	3,653	156	12	646	57	23	4,942	174

Table Y.—ARRIVALS and Departures of Vessels at and from the Port of Beni-Saf during 1893.

Nationality.	Arrivals.						Departures.					
	With Cargoes.			In Ballast.			With Cargoes.			In Ballast.		
	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.
French ..	..	1,495	123	16	7,635	342	11	7,522	341	1	41	6
British ..	..	1	17	55	63,850	1,277	76	87,758	1,683	..	..	..
Belgian ..	..	..	..	1	723	17	..	..	..	..	84	7
Spanish ..	..	34	7	..	..	..	..	..	..	1	..	..
Morocco ..	..	12	7	3	7	15	3	7	15	..	..	..
Total ..	10	2,667	154	75	71,618	1,651	90	95,287	2,039	2	76	13

The total amount of iron ore exported from Beni-Saf during 1893 was :—

To—						Quantity.
						Tons.
France	..	..	..	..	..	16,322
Belgium	..	..	..	..	..	505
Holland	..	..	..	..	..	60,858
Great Britain	..	..	..	..	..	123,760
United States	..	..	..	..	..	2,377
Total	..	..	..	..	..	203,338

The last port on the coast is Nemours, where there is no safe anchorage and very little trade.

Table Z.—ARRIVALS and Departures of Vessels at and from the Port of Nemours during 1893.

Nationality.	Arrivals.						Departures.					
	With Cargoes.			In Ballast.			With Cargoes.			In Ballast.		
	Number of Ships.	Tonnage.	Number of Crews.	Number of ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.	Number of Ships.	Tonnage.	Number of Crews.
French ..	..	36	13,500	928	43	4,477	59	8,553	738	25	11,747	799
Spanish..	..	8	80	34	22	251	26	301	111	5	36	13
Morocco	..	5	37	30	..	..	..	..	..	1	5	5
Total ..	..	49	13,617	992	65	4,728	85	8,854	849	31	11,788	821

Agricultural Report.

The harvest of 1892-93 was deplorably bad on account of the persistent drought which afflicted all the Mediterranean region and even more remote countries. Statistics regarding the quantity of grain produced are not yet available, but the Governor-General in his recent address to the Conseil Supérieur stated:—

"An intense agricultural crisis seems at this moment to be passing over the world; you are aware of the numerous failures from which the agriculture of the United States is suffering. Europe has not been spared. It is natural that this crisis should also be felt on this side of the Mediterranean. I went as frequently as I could amongst the population; I interrogated them, I found everywhere that endurance and goodwill which are the strength of our colonists, and which have already made them come out victorious in other crises which have in former times afflicted the colony. I also went amongst the natives, whose labour is so necessary to us, I will inform you of their needs, &c."*

Some idea of the extent of this agricultural crisis may be obtained by the decreased exportation of cereals during the year 1893.

The decrease in 1893 as compared with 1892 was: wheat, 854,130 bushels; barley, 688,719 bushels; green vegetables, 2,257,201 kilos. The decrease on the exportation of fruit was about 7,500,000 kilos. There are also a very large increase in the amounts imported, showing that the colony did not produce a sufficient quantity for its own consumption, as well as having little to export.

On January 1, 1893, the agricultural population consisted of 3,477,146 persons, 200,161 being Europeans and 3,276,985 natives. The value of the implements in their possession was valued at 27,784,429 fr. (1,111,377*l.*), an increase of more than 100,000*l.* as compared with the previous year.

The following table shows the number of animals of all kinds in their possession:—

TABLE I.

Beasts.	Belonging to—		Total.
	Europeans.	Natives.	
	Number.	Number.	Number.
Horses	40,179	179,868	220,047
Mules	25,458	125,617	151,075
Asses	12,933	284,388	297,321
Camels	172	261,573	259,094
Cattle	136,865	1,094,645	1,233,051
Sheep	343,094	9,032,801	9,375,895
Goats	68,296	3,745,889	3,709,600
Pigs	83,640	181	83,821
Total	710,637	14,724,790	15,435,427

* The address is dated December 31, 1893.

An increase of 629,978 over the number returned during the previous year.

Extent of
various
crops.

STATEMENT showing the Area under Cultivation with Crops of various kinds, and the amount of each produced, during the Year 1891-92.

Nature of Crops.	Area.		Quantity.	
	Hectares.		Met. quintals.	
Soft wheat	187,478		763,822	
Hard "	1,094,989		4,673,594	
Rye	331		2,142	
Barley	1,442,522		8,178,690	
Oats	47,298		389,788	
Indian corn	13,134		84,782	
Beans	49,409		177,276	
Millet	33,853		185,211	
Potatoes	7,999		189,189	

NOTE.—1 hectare = 2½ acres; 1 quintal = 220·490 lbs.

The amount of grain produced by native cultivation compared with that of Europeans, was:—

Description.		Per Cent.
Soft wheat	55	
Hard "	80	
Barley	76	

Experiments
in agriculture.

In last year's report I alluded to the experiments undertaken by Dr. Trabut, Professor of Applied Botany. He has now presented a report to the Government-General, in which he strongly urges the creation of a "station d'expériences agricoles." With the means already at his disposal he has carried out a series of experiments regarding the indigenous and foreign varieties of grain; useful plants of all kinds; reforesting the country; the creation of pasturage; publication of the local flora, and the diseases of plants.

Wheat.

Specimens of 150 different varieties of wheat were sent to 85 correspondents, but the result was not altogether satisfactory or conclusive. The exceptional drought of 1892-93 was unfavourable to some kinds, which in ordinary weather might have grown better, but this failure told in favour of others which survived. The locusts destroyed more than one experimental field, and the ravages committed by sparrows were most serious. These birds are becoming a great obstacle to agriculture, and it seems time to adopt some measures for their destruction. Lastly, the misery which prevailed throughout the colony induced the half-starving Arabs to rob, not only fields in general, but even those in which experiments were being carried on.

It seems clearly proved that the best kinds of wheat from the North of France never reach complete development in Algeria. Some wither after the ears have formed, others are killed by rust. It is only the varieties from the South of Europe that reach maturity. The soft wheat which has given the best result is that called "Richelle blanche hâtive améliorée." This was sown in sandy soil at Mostaganem, to the extent of 40 lbs. per acre; the end of winter and the beginning of spring were so dry that the crops throughout the district suffered greatly and in some cases failed entirely, while the variety in question resisted completely, and gave a return of 26·1 per cent. It would have yielded more had a greater amount of seed been sown. The common soft wheat of the country rarely produced more than one-third of this quantity.

M. Trabut paid especial attention to hard wheat. Of 12 varieties of native origin distributed for experiment, some have proved so successful that several colonists have sent for seed to the Aurès Mountains whence these specimens had been obtained. Several Greek varieties also gave satisfactory results.

It is not necessary to follow M. Trabut further in his experiments, he gives much valuable information regarding other agricultural products, forage producing plants, foresting trees having an industrial value, textile plants, and the reforesting of waste places.

Whatever may be done to ameliorate the quality of wheat, it is doubtful whether the culture of it will ever again be as profitable as in times past. A colonist recently writing to a journal which takes great interest in agriculture says:—"Several colonists amongst my friends have decided to abandon, for some time at least, the cultivation of cereals, especially of wheat, the price of which is far from remunerative," and he goes on to ask what other culture can be recommended.

Colza has been suggested, it is said to grow on almost any soil which retains a fair amount of freshness and moisture till April, such as the Tell. Colza.

M. Millot, a well known authority on agriculture, gives the following comparison between it and wheat per hectare:—

COLZA.

Description.						Amount.
						Francs.
Ploughing ..	..	..	..	..	..	40
Harrowing ..	..	..	..	..	..	6
Delving ..	..	..	..	..	..	50
Harvesting ..	..	..	..	..	..	22
Threshing ..	..	..	..	..	..	12
Manipulation ..	..	..	..	..	..	24
Total ..	..	..	..	..	..	154

WHEAT.

Description.	Amount.
	Frames
Ploughing	40
Second ploughing	20
Harrowing	6
Sowing	30
Weeding	6
Harvesting, &c.	25
Total	127

Colza sells easily at 26 fr. per 100 kilos., or, for a harvest of 12 quintals, 312 fr. The same quantity of wheat at 20 fr. would produce 240 fr. The benefit, therefore, in favour of colza would be 72 fr.

Viticulture. The situations of Algerian vine culture on December 31, 1892, were as follows:—

Departments.	Superficies Planted.	Quantity of Wine Produced.
	Hectares.	Hectolitres.
Algiers	42,179·44	1,138,042
Oran	45,652·48	1,297,253
Constantine	24,046·72	566,783
Total	111,878·64	3,002,078

The wine produced during this year was more than 1,000,000 hectares less than during the preceding one. During 1892 Algeria exported 2,833,221 hectolitres of wine, the principal part of which went to France. Great Britain and her Mediterranean colonies only took 672 hectolitres.

A series of several consecutive bad years in Algeria, the re-constitution of French vineyards by means of American vines, and apparently a combination amongst purchasers of wine to keep down prices have had a most serious effect on Algerian viticulture. During the year 1892-3 the wine produced has been unusually abundant and excellent, but the impossibility of obtaining a remunerative price for it threatens the producers with absolute ruin. Many of them are at an end of their resources, and even the natives seem desirous of selling their properties. If things go on at this rate cultivators who have borrowed money on mortgage of their land will have to submit to foreclosure, and institutions like the "Crédit Foncière" are likely to become the only great proprietors in the colony.

Vice-Consul Scratchley thus describes the state of viticulture in the important wine-producing country round Philippeville in the department of Constantine:—

"The crop was fair as regards quantity but inferior as to quality; the excessive dryness and heat prevented a proper fermentation. The wines remain sweet, and those that have lost their sweetness are green. The prices offered are ruinous, 75 c. to 80 c. per 1 degree, and for wines of 12 degrees alcohol (French), 9 fr. to 9 fr. 60 c. per 100 litres. As the produce per hectare on the hills is not more than 25 hectolitres, and the cost of cultivation and harvesting amounts to at least 300 fr. per hectare, producers have been working at a dead loss, and have no means of paying interest on capital, maintenance of cellar, and other expenses.

"On the plains they are hardly better off; the produce is greater, 80 hectolitres to 100 hectolitres per hectare, but the price is much less. At Jemmapes, for instance, the price in some cases was 5 fr. 50 c. per hectolitre, delivered on the quay at Philippeville, or in the vaults of the purchaser. As the carriage from Jemmapes to Philippeville costs 2 fr. to 2 fr. 50 c. per hectolitre, the net price paid to the cultivator hardly pays the expenses of cultivation.

"Colonists complain not only of unfruitful seasons and the *Distillation.* impossibility of selling their wine at remunerative prices, but they think they have a grievance against the Administration as well. This has been stated, not unfairly, as it appears to me, by a correspondent to the 'Estafette.' He says:—"The Algerian viticulturists complain bitterly of the condition in which they are placed. Although the produce of their vineyards does not exceed an average harvest, they are unable to sell their wine save at a ludicrous price. Moreover, they pretend that the greatest prejudice is caused to them by the fact that the Administration has given most stringent orders to her "Service des Contributions Directes" regarding distillers.

"The travelling distillers who were employed by the small producers have been hunted out. The latter have received frequent visits from [excise] agents, who have threatened them with prosecution if they distilled their "marc," their "piquette," or their undrinkable wine. Owing to these threats the small producers have been obliged to throw their "marc" into the manure heap; their bad wine they have sold for little or nothing.

"These wines, cleverly introduced into the cellars of rich proprietors in the South of France, pass into the still. The distillers, owing to their privileged position, transform them into alcohol, free of duty, for the fabrication of wines called "petit vinés," of from 14 degrees to 15 degrees, which are largely consumed in Paris.

"These Draconian measures affect those whom the drought or the inclemency of the weather have spared. More than 1,000,000 fr. are thus lost without any benefit, and the following summer a loss of at least the same amount is suffered by proprietors who have not been able to sell such of their produce as may not be strong enough to support the heat of summer.

“Another measure has lately been enforced which is most prejudicial to small proprietors, who only produce a few hogshheads of wine, more or less badly made. They may not sell their wine in detail—that is, by the litre—without having made a declaration to the Administration, paid licence, &c.

“This is equally hard upon the workman, who is obliged to purchase his wine at the public-house, where it is much more dear, and not always unadulterated.

“All this might be supported if the money reached the Government Treasury, but such is not the case; the amount collected does not pay a quarter of the costs of collection.”

“Another paper states:—‘The situation is deplorably grave, but it threatens to be even worse in two or three months. There is only one issue, only one solution: distillation. Unfortunately the majority of the colonists have renounced distillation through horror of the exciseman; many have sold their stills. On the other hand, working distillers, who had commenced to render great services by sending their travelling stills round to the various farms and villages, have been obliged to pack up and return to France for want of work.’”

Phylloxera.

The phylloxera still continues its ravages. Many proprietors have tried American vines in the neighbourhood of Philippeville, where since the experiment was permitted 462,000 plants have been distributed. It is estimated that 60 per cent. of the cuttings have taken root, but few of the colonists can afford to wait till the new plant becomes productive. Many of them have turned their attention to other cultures, such as almonds and figs.

In the “circonscription” of Bône, containing six communes, there are 346 properties on which vines are cultivated, containing an area of 2,648 hectares (6,620 acres). In 56 instances the phylloxera was observed.

The department of Algiers, though carefully examined, was found to be still free from phylloxera. Other vine plagues, such as altise, committed little or no ravages, and as a consequence the wine crop was abundant and considerably above the average.

In the department of Oran the vines suffered greatly from drought, and phylloxera appeared in several new places. The crop was not more than two-thirds of the average.

In Constantine the plants suffered much from mildew, and the phylloxera spread as far as Jemmapes.

Mannite.

Great agitation and discussion has taken place regarding the presence of “mannite” in Algerian wine, and it is alleged that this has tended to give it a bad character abroad. I cannot undertake to describe this substance, save in the words of the Director of the Agronomic Station at Algiers. He says:—“La mannite est un alcool hexatomique qui cristallise en prismes rhomboïdaux droits. Elle est faiblement lévogyre, ne réduit pas le tartrate cupro-potassique et subit très difficilement la fermentation alcoolique, elle fond à 165 degrés.”

He maintains that this substance has no prejudicial effect on wine.

It is remarkable that with all the outcry about not being able to obtain remunerative prices little or no attempt should be made to turn the grapes to better account. Sweet wines, "vins de liqueur," or wine of the nature of sherry or malaga, might prove more marketable than the common rough "vin ordinaire," abundant in quantity but inferior in quality, which alone colonists think it worth their while to produce. Raisins also are abundantly saleable, but no attempt has been made thus to utilise grapes. What succeeds in Spain can hardly fail here if only ordinary intelligence be employed.

In an address which I gave at the British Association at Leeds I attempted to show how perfect was the continuity of the South Coast of Europe and the North of Africa. Perhaps I may be permitted to quote a short passage:—

Continuity
between
North Africa
and Europe.

"The Atlas range is a mere continuation of the south of Europe. It is a long strip of mountain land, about 200 miles broad, covered with splendid forests, fertile valleys, and in some places arid steppes, stretching eastward from the ocean to which it has given its name. The highest point is in Morocco, forming a pendant to the Sierra Nevada of Spain; thence it runs, gradually decreasing in height, through Algeria and Tunisia, it becomes interrupted in Tripoli, and it ends in the beautiful green hills of the Cyrenaica, which must not be confounded with the oases of the Sahara, but is an island detached from the eastern spurs of the Atlas in the ocean of the desert.

"In the eastern part the flora and fauna do not essentially differ from those of Italy; in the west they resemble those of Spain. One of the noblest of the Atlantic conifers, the 'Abies pinsapo,' is found also in the Iberian peninsula and nowhere else in the world, and the valuable alfa-grass or esparto ('Stipa tenacissima'), from which a great part of our paper is now made, forms one of the principal articles of export from Spain, Portugal, Morocco, Algeria, Tunisia, and Tripoli. On both sides of the sea the former plant is found on the highest and most inaccessible mountains, amongst snows which last during the greater part of the year, and the latter from the sea-level to an altitude of 5,000 feet, but in places where the heat and drought would kill any other plant, and in undulating land where water cannot lodge.

"Of the 3,000 plants found in Algeria by far the greater number are natives of Southern Europe, and less than 100 are peculiar to the Sahara. The macchie or maquis of Algeria in no way differs from that of Corsica, Sardinia, and other places; it consists of lentisk, arbutus, myrtle, cistus, tree-heath, and other Mediterranean shrubs. If we take the commonest plant found on the southern shores of the Mediterranean, the dwarf palm ('Chamærops humilis'), we see at once how intimately connected is the whole Mediterranean region, with the exception of the localities I have before indicated. This palm still grows spontaneously in the south of Spain, and in some parts of Provence, in Corsica, Sardinia, and the Tuscan Archipelago, in Calabria and the Ionian Islands, on the continent of Greece, and in

several of the islands in the Levant, and it has only disappeared from other countries as the land has been brought under regular cultivation. On the other hand, it occurs neither in Palestine, Egypt, nor in the Sahara.

"The presence of European birds may not prove much, but there are mammalia, fish, reptiles, and insects common to both sides of the Mediterranean. Some of the larger animals, such as the lion, jackal, panther, &c., have disappeared before the march of civilisation in the one continent, but have lingered, owing to Mohammedan barbarism, in the other. There is abundant evidence of the former existence of these and of the other large mammals, which now characterise tropical Africa, in France, Germany, and Greece. It is probable that they only migrated to their present habitat after the upheaval of the great sea which in Eocene times stretched from the Atlantic to the Indian Ocean, making Southern Africa an island continent like Australia.

"The fish fauna is naturally the most conclusive evidence as to the true line of separation between Europe and Africa. We find the trout in the Atlantic region and in all the snow-fed rivers falling into the Mediterranean; in Spain, Italy, Dalmatia; it occurs in Mount Olympus, in rivers of Asia Minor, and even in the Lebanon, but nowhere in Palestine south of that range, in Egypt, or in the Sahara. This fresh-water salmonoid is not exactly the same in all these localities, but is subject to considerable variation, sometimes amounting to specific distinction. Nevertheless it is a European type found in the Atlas, and it is not till we advance into the Sahara, at Tuggurt, that we come to a purely African form in the Chromidae, which have a wide geographical distribution, being found everywhere between that place, the Nile, and Mozambique."

Importation
of French
fruit.

The phylloxera scare induced the Government of France to prohibit the entry into Algeria of every kind of fruit and fresh vegetables, except potatoes after having been washed. This law has now been abrogated, but the following are still prohibited:—Cuttings and everything connected with vines, live plants, and vegetable manure.

Locusts.

In 1893, as during the two previous years, there has been a double invasion of locusts in the colony.

The Morocco variety was confined chiefly to the high-plateaux in all the three provinces.

The invasion of pilgrim locusts was more general, and extended from the borders of the desert to the sea. In the more fertile region of the Tell the eggs and larvae were, to a great extent, destroyed by an animal and a vegetable parasite, the "*Idia fasciata*" and the "*Lachnidium acridiorum*." In spite of this, however, the Administration was obliged to make great efforts and to expend large sums in destroying these scourges in all their different phases of existence. The result was most satisfactory; except in a few rare cases the crops were saved throughout the whole extent of the colony.

Two works of considerable importance have lately been published under the auspices of the Government-General:—

1. "Chevaux Barbes, Arabes, et Arabes-Barbes de l'Algérie et de la Tunisie," par E. Aureggio, vétérinaire en premier de la place d'Alger, et F. Blaise, vétérinaire en premier au dépôt de remonte à Blida. Alger. 4to., pp. 460.

2. "Le pays du Mouton: des conditions d'existence des troupeaux sur les Hauts-Plateaux et dans le Sud de l'Algérie," ouvrage publié par ordre de M. Jules Cambon, Gouverneur-Général de l'Algérie. Alger. 4to., pp. 437, with 15 plates and 6 maps. Compiled by M. A. Turlin, F. Alcardo, and G. B. M. Flamand.

In the former of these works, after an "avant propos" of 55 pages on the physical geography of Algeria, the authors divide their subject into the following chapters:—

Chap. I.—Origine du cheval en général; histoire et origine probable du cheval barbe.

Chap. II.—Du pur sang en général; pur sang arabe; barbes de races pures; robes de chevaux barbes.

Chap. III.—Histoire de la remonte générale; dépôts mixtes de remonte et d'étalons; jumenteries; opérations de la monte; documents à consulter sur la situation des haras.

Chap. IV.—Production chevaline de l'Algérie.

Chap. V.—Qualité des chevaux de guerre de France et d'Algérie.

Chap. VI.—Courses; leur utilité au point de vue de l'amélioration des races chevalines; entraînement; chevaux anglais et chevaux arabes; courses en Algérie; ressources du pays en denrées fourragères; qualité de ces denrées.

Chap. VII.—Histoire de la dégénérescence des chevaux arabes et barbes.

Chap. VIII.—Animaux employés dans l'armée autres que le cheval.

Chap. IX.—Hygiène; médecine; chirurgie; coutumes arabes.

Chap. X.—Police sanitaire et jurisprudence.

Conclusions et propositions.

A second part of the work is devoted to the horses of Tunisia.

It is clearly impossible within the limits of a consular report to give even the slightest summary of a work of this extent. The preceding table of contents will suffice to indicate to those interested in the matter, where abundant information can be obtained regarding it. The volume is illustrated with numerous photographs.

The second volume which I have quoted is an exhaustive treatise on a branch of industry of vital importance to the Arabs of Algeria. The troubles of various natures which have so frequently broken out in the south of the colony rendered it almost impossible for the Administration, until quite lately, to devote special attention to ameliorating the conditions of existence

of the great flocks of sheep which live on the high-plateaux and on the slopes leading down to the Sahara. The efforts of the Administration were, naturally enough, directed in the first instance to European colonisation, and the creation of villages absorbed all its available resources. It is only within the last few years that it has been able to turn its attention to the construction of artificial reservoirs in regions where, owing to the want of water, the Arabs were unable to utilise extensive tracts of country covered more or less with pasturage in summer. The Arab sheep does not require much water, but hitherto it has been only in regions where "ghadirs" were formed by winter rain in natural depressions that their flocks could exist. The absence of watering-places had also the effect of impoverishing the pasturage in regions where natural reservoirs existed, while further off abundant forage dried up unused. This was a serious obstacle to any extension in the breeding of sheep, one of the most important industries in the colony.

The Governor-General invited the *Préfets* in civil and the Generals Commanding in military territories to study the question and to submit a list of ghadirs necessary, in their opinion, to be constructed, classified in order of their urgency. But first it was thought advisable to compile a general inventory of the resources in water and pasturage possessed by the nomadic tribes. The reports furnished in obedience to this injunction form the contents of the volume under notice.

It contains several other papers in addition. Notes on the sheep of the provinces of Algiers and Oran; on those of Eastern Morocco; on the different varieties in the department of Constantine and in Tunisia; several other appendices, and lastly, a valuable chapter entitled "*Considération Générales*" from which I cannot resist making a few extracts.

Beginning in a very narrow strip in the province of Constantine, the high-plateaux go on increasing in width from east to west. Along their whole length, especially in the middle, a series of salt lakes is formed of varying sizes called by the Arabs *Guerah* or *Zarez*, but more generally *Cholla*. From these depressions, full of water in winter, but dry in summer, the level of the ground rises towards the south. There, along the extremity of the Atlantic range, from Morocco to Tunisia several chains of mountains rise, for the most part in a parallel direction, uniting the three principal "massifs" of M'zi, *Djebel Amour*, and the *Aurès*. Almost at the very foot of the Atlas range which descends in abrupt slopes the Sahara commences; immense tracts covered with dunes of sand; vast plains and plateaux of the most desolate aspect and extensive valleys, more or less arid and generally dotted over with fertile oases. These valleys, which generally run from north to south-east, are the only portions of the Sahara of any real value. In their beds, generally dry both in summer and winter, run the subterranean streams fed by the drainage from the high-plateaux.

The pastoral tribes have all distinct regions for winter and

summer use, partly in the high-plateaux and partly in the Saharan region. The former are uninhabitable in winter on account of the cold and snow. While in the latter, from November to April the climate is less vigorous and vegetation is possible. In many places, however, the insufficiency of pasturage is as much felt in winter as in summer.

The most important pasturages are in the south of the province of Oran; the tribes in the north of the high-plateaux there have pretty nearly enough for their wants, and are even able to keep a few cattle in addition to their sheep, a portion of the district being forest land and tolerably well supplied with water. Those in the centre and south keep their sheep in summer partly in mountain land and partly on the vast steppes covered with alfa-grass and artemesia. They are compelled, however, to migrate early in autumn to avoid being caught in the snow as they have neither shelter nor any reserve of forage.

The native sheep is a hardy animal and supports without difficulty these long marches; it is also able to endure great privation, but it does require some little food on the way, and water at least every 3 or 4 days, whether sweet or brackish seems to be of little consequence. But this they cannot always find; when the ghadirs on which the shepherd relies are found to be dried up, as is not unfrequently the case, the very existence of his flock is in danger.

To avoid the necessity for these long peregrinations, the sheep in the north would require to be furnished with covered folds and a supply of dry forage; those in the south might do without shelter, but they would require permanent prairies, a matter very difficult to bring about. It may, therefore, be assumed that the system of periodical changes cannot practically be avoided. All that is required to render it possible to increase the important industry of sheep-breeding is to take care that the pasture grounds are not injured by the too frequent and too lengthened residence of flocks of sheep and herds of camels in one place; by an abuse of alfa gathering and by creating an increased supply of water.

The first thing necessary is evidently to improve existing wells; these have rarely any revetment or cover, and are often filled in by sand; they are supplied by channels roughly scratched by hand in the ground, which carry in their course the excrement of cattle and water corrupted by trampling of sheep. No attempt is made to remedy this till the water becomes so impure that the animals refuse to drink it.

It is not enough, however, to improve the condition of existing watering places; new ones must be created, especially on the routes followed by the sheep in their migrations, and in regions where it is, at present, impossible for them to remain at all. Abundant data of the requirements of the colony have been collected in this volume. All that is now required is to make a commencement of the work.

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AND FINANCE.**

F R A N C E.

REPORT FOR THE YEAR 1893

ON THE

**TRADE, &c., OF THE CONSULAR DISTRICT OF
CHERBOURG.**

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1270.

*Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1894.*

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FRANCE.

CHERBOURG.

Consul the Hon. H. P. Vereker to the Earl of Kimberley.

My Lord,

Cherbourg, March 22, 1894.

I HAVE the honour to enclose a Report for the year 1893 upon the Trade, Commerce, and Agriculture of the Departments of La Manche, Ille-et-Vilaine, and Sarthe.

I have, &c.

(Signed) H. P. VEREKER.

Report on the Trade, Commerce, and Agriculture of the Consular District of Cherbourg for the Year 1893.

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DEPARTMENT OF LA MANCHE (CHERBOURG).

Shipping and Navigation.

RETURN of all Shipping Engaged in the Foreign Trade at the Port of Cherbourg during the Year 1893.

ENTERED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	348	80,129	213	28,292	561	108,421
French ...	26	3,409	25	726	51	4,135
Danish ...	2	886	...	...	2	886
German ...	4	3,800	...	...	4	3,800
Norwegian ...	7	5,124	...	...	7	5,124
Russian ...	4	1,288	1	804	5	1,892
Swedish ...	6	4,626	1	108	7	4,634
Total ...	407	99,162	240	29,490	647	128,652
„ for the year preceding ...	418	121,237	222	26,167	640	147,404

CLEARED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	504	95,579	72	11,246	576	106,825
French ...	18	2,005	16	4,308	34	6,313
Danish ...	...	...	2	886	2	886
German ...	...	...	4	3,800	4	3,800
Norwegian ...	...	...	7	5,124	7	5,124
Russian ...	1	348	1	327	2	675
Swedish ...	...	...	7	4,634	7	4,634
Total ...	523	97,932	109	30,325	632	128,257
„ for the year preceding ...	516	120,818	120	30,724	636	157,542

The British shipping engaged at this port is about 90 per cent. of the whole shipping employed in the foreign trade, and the French vessels so employed are mostly occupied in the trade to and from England.

Freights.

Freights in the latter part of the year show a firm tendency ; for coals they have averaged throughout, 5*s.* to 6*s.* 6*d.* from the northern ports and 4*s.* 6*d.* to 6*s.* from the Welsh ports, the freight for stone outwards has varied from 3*s.* 6*d.* to 4*s.* 6*d.*

Wrecks.

A violent gale which blew upon this coast during the third week in November caused considerable havoc among the ships and fishing boats from Dunkirk to Cherbourg, the coast was strewn with wreckage and there was a large loss of life, the northern coast of La Manche was exposed to the fury of the wind and seas, and many wrecks of French and foreign vessels took place : the British casualties included the following vessels lost, viz., the schooner "Three Janes," of Swansea, with a cargo

of cement from London to Liverpool, driven ashore at Barneville; the new screw steamer "Cartagena" from Bremerhaven to Bilbao in ballast, stranded at Rethoville; the schooner "Alpha," of Faversham, from Newcastle with coals, bound for Courseulles; and the schooner "William Cass," of Goole, with pipe-clay from Teignmouth for Dundee, which foundered at sea, the crew being rescued and brought to this port by the schooner "Emperor," of Banff; fortunately no lives were lost in the British casualties mentioned.

The coasting trade in French vessels occupied inwards 760 Coasting vessels, 86,436 tons, and 4,930 in crews; outwards, 734 vessels, trade. 136,325 tons, and 5,488 in crews. These figures show a continuance of the progress in this industry which has been noted in previous reports.

Trade and Commerce.

RETURN of Principal Articles of Export at Cherbourg during the Years 1893-92.

Articles.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Butter	15,180	17,552
Coals	6,106	7,875
Eggs.	624	653
Fowls	85	92
Horses	9	..
Iron, chains, &c.	424	..
Meat, butchers	553	249
Potatoes	3,369	3,017
Rags.	66	112
Stone (macadamised)	38,228	38,077
Tar	378	363
Vegetables	1,468	1,393
Wine	12	251
Wood (for cabinet work)	17	344
" pit	784	..
Other articles	713	3,309

The most remarkable feature in this return is the arrest it exhibits in the progress of the largest export, that of macadamised stone; this export from 950 tons in 1889 had risen to 38,000 tons in 1892, an increase of 4,000 per cent., and has remained practically stationary in 1893; though this important part of the export trade has not maintained its advancement in the last year as it ought to have done, there was no lack of activity, the Commercial Dock was crowded with shipping seeking cargoes, the quays overburdened with macadamised stone, labour was plentiful and efforts were made to give quick despatch to vessels, (1712)

nevertheless the shipments show no corresponding increase, and the conviction is forced upon the mind that the resources of the port of Cherbourg, as it exists, have been taxed to the utmost, and that under present conditions it does not possess the means adequately to maintain the very large trade offering in these materials.

Yet such a trade is purely in benefit of the exporting country, it is a large employer of labour, a distributor of wealth, and no public endeavour should be spared to promote and encourage the commerce. In the last trade report from Cherbourg some suggestions were made as to what seemed most necessary and pressing to be done to develop the export of stone if it were to be given a large expansion; another suggestion is subjoined which, though formerly put forward to relieve the encumbrance of the commercial basin, is now specially applicable with reference to the export of macadamised stone. It is this, alongside of the commercial basin, the existing floating dock, is another basin divided from the former by a few yards of road and possessing nearly equal length of quays, it has been for many years disused and is an eyesore and objectionable in the town, but by connecting it by a short canal with the commercial basin, it would be suitable for the shipment of any probable amount of macadamised stone, its quays in that case should be straightened and faced with granite and the sluice gate connecting with the sea modified; the expense in comparison with the object to be gained would be insignificant; tramways should also be placed from the quarries right round the new basin to bring stone, but as this is nearer the quarries than the present floating dock, and tramways from the quarries already reach to the bottom of the new basin, the work could be easily executed.

Butter.

The diminished exportation of butter is due to the dryness of the year, and consequent insufficient pasture, which caused butter and milk to be scarce and dear.

RETURN of Principal Articles of Import at Cherbourg during
the Years 1893-92.

Articles.	Quantity	
	1893.	1892
	Tons.	Tons
Boats		44
Coals	36,505	44,415
Fish, fresh	17	31
Fruit	1	45
Lobsters, fresh	11	10
Manure, guano and phosphate ..	5,187	1,653
Oats	560	..
Wheat	3,443	197
Wine	35	1
Wood, oak staves	296	766
„ deals, rough and worked ..	14,350	20,522
Other articles	1,573	3,792

Few Berthon boats were imported in 1893, the torpedo boats Boats. being fully supplied with one or more according to their size.

The employment of guano and artificial manure is being more Guano. favoured in local agriculture.

Wheat in excellent condition was brought from Lyttleton, Grains. New Zealand; the oats from Waterford. The large increase of such imports at Cherbourg and Grauville indicates deficiency in home supplies.

It is noticed that several British steamers have been employed Wood. last year in the carrying trade of wood from Sweden, Russia, and Germany; this trade used to be monopolised by the vessels of the northern powers.

Public Works.

The breakwaters to close in Cherbourg roads have been Breakwaters. steadily worked upon in 1893, that on the eastern side uniting the island of Pélée with the coast is brought to its permanent height throughout, but copings and facings are required before its completion. The western breakwater from the fort of Querqueville to the island of Chavagnac now connects those extremities, and is over sea level throughout, but only slightly so in the part joining Chavagnac, and for one-third of the distance thence towards Querqueville, and at high tide or in rough weather the seas wash over this part. The other portion of the construction is much more raised. In the gale which prevailed in November some injury was done to the works near Chavagnac, but the repairs are nearly complete.

Activity is displayed in laying the railway from Carentan to Railways. La Haye du Puit, and it is expected to be opened for traffic early in 1894. This line will open up an agricultural and pastoral district hitherto unprovided with railway accommodation.

The companies interested in the quarries of the Montagne du Tramways. Roule have undertaken to complete the tramways from the quarries to the floating dock, they having been abandoned upon the failure of the former contractors and remained in abeyance throughout the year. It is understood that those gentlemen propose to carry the tramways up to and along the eastern quay of the dock; this will be advantageous so far, but unless the tramways are constructed round the dock, specially on the western side, they will not give much impulse to the export trade in stone, as there is available room on the western quay, though not on the eastern, the space on the latter being more limited and partly occupied by the existing tramways, from the Ouest Railway Station along the quay, for the service of the coal and general trade.

Much enterprise in the building of houses has been manifested Building. at Cherbourg in the last year. Several new streets have been opened, and many houses constructed, sometimes in blocks of several together. No difficulty is found in letting the new houses,

and notwithstanding the large additional number built rents have a steady upward tendency. In conjunction with this advancement, the lands in and about the town, specially building plots, have considerably increased in value; on the other hand, agricultural lands, unless near a town or a railway station, are not sought after, and sales can only be effected at a substantial reduction on former values, a tendency to abandon country parts and congregate in towns being manifest among the rural population.

Water
supplies.

The main supply of water for the use of the inhabitants of Cherbourg is derived from the River Divette. This river is tapped at a distance of about half-a-mile from the town, and the waters are pumped by steam machinery to a large cistern on a height above the level of the town houses, whence they are distributed by pipes throughout the town. To maintain the purity of the water, police regulations prohibit the washing of clothes or any other proceedings by which the water might be contaminated to take place above the point where the river is tapped for town supplies.

The system worked well for a very long period, but of late years, above the point where the town supplies are obtained, mills and other works were erected on the side of the river, houses accumulated, agriculture, mainly with artificial manures, increased, all which tended to spoil the purity of the water supplied for consumption; and its deterioration was so obvious that a feeling was aroused among the people that an efficient remedy must be found. This sentiment was intensified by the recurrence of outbreaks of typhoid fever and lesser epidemics, and by its being proved by analysis that the water used for drinking contained organic matter in appreciable quantities, besides unwholesome germs.

The Municipal Council of Cherbourg, finding that there was no other available stream excepting the Divette, which would furnish water in sufficiency, directed their attention to means for purifying by filtration the Divette water, and desired particularly to introduce the system so successfully practised with the waters of the Thames and other rivers contributing to the supply of London. With that view this Consulate was applied to for information, and through the courtesy of the Foreign Office and Local Government Board, I was enabled to communicate to the Town Council full details on the subject, and an able report by General De Courcy Scott, exhaustively treating the question.

A committee of the Town Council proceeded to London so as thoroughly to understand the working of the great water companies, and it is probable that the excellent system so successfully established by the Chelsea Waterworks Company, will be adopted at Cherbourg; and as the inauguration of such a system requires consideration and time, and immediate relief to the population was urgently required, a temporary expedient has been found by erecting a number of filters of the Maignen patent in various parts of the town; these filters receive water from the Divette, and are each calculated to yield 5,000 litres of purified water per day, they are constantly in use.

DEPARTMENT OF ILLE-ET-VILAINE (ST. MALO).

Mr. Vice-Consul Henniker-Major reports as follows on trade and agriculture :—

Barley and buckwheat have been little exported hence to the Barley. United Kingdom, prices being more remunerative with ports in the north of France, the chief trade being with Dunkirk.

Butter has been higher in price in the markets hereabouts Butter. owing to the extreme drought. The Rennes butter now sold in this town is of excellent quality, but is now 2 fr. per lb.

Potatoes, Myatt's, sold at the beginning of the early potato Potatoes. season at 15 fr. per cwt. and in June at 6 fr. 50 c., and Flukes averaged about 6 fr. all through the season, while rounds were only about 3 fr. per cwt. Considerable export was made, and fine weather enabled packers to despatch the crop in good order.

Cauliflowers as a second crop, after potatoes, have been a con- Cauliflowers. siderable export, with a tendency to increase.

Fruit was an abundant crop and large quantities of pears and Fruit. apples were exported, also plums, gooseberries, blackberries, and tomatoes.

This export has not much increased during the past year, the new manufactory at Dinan not having started work yet. Export Essence of chiefly to Belgium is about 150 tons to 200 tons per month. chestnut.

Shipbuilding has revived a little here, and several wooden Ship building. vessels, intended mostly for the Iceland fishing, have been built by Messrs. Gautier and Mallard during the past year.

Permanent way is being put down on the inside of the St. Rails. Malo and St. Servan Docks, with communication with the railway station to facilitate the use of the quays on each side of the basins.

A new hand crane, 20,000 kilos. power, has been established Crane. at the lower end of St. Malo Dock, nearest the town.

RETURN of all Shipping at the Port of St. Malo-St. Servan during the Year 1893.

ENTERED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	665	179,154	56	5,533	721	184,687
French	3	904	112	5,065	115	5,969
Other nations ...	14	4,373	9	2,467	23	6,840
Total	682	184,431	177	13,065	859	197,496
„ for the year preceding ...	712	187,912	404	37,627	1,116	225,539

FRANCE.

CLEARED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	599	167,662	146	5,660	749	174,062
French	1	371	57	5,786	58	6,157
Other nations ...	16	4,878	2	487	18	5,365
Total	616	172,911	229	12,065	845	185,414
.. for the year preceding ...	530	107,574	298	27,661	828	135,235

RETURN of Principal Articles of Export from St. Malo and
St. Servan during the Years 1893-92.

Articles.	St. Malo.		St. Servan.	
	1893.	1892.	1893.	1892.
	Tons.	Tons.	Tons.	Tons.
Barley	41	14,217	10	18
Buckwheat	39	3,846	9	22
Butter	2,564	3,582	..	..
Eggs	7,567	5,150	..	..
Potatoes	21,892	19,555	472	445
Fruits	9,161	2,986	482	20

RETURN of Principal Articles of Import from St. Malo and
St. Servan during the Years 1893-92.

Articles.	St. Malo.		St. Servan.	
	1893.	1892.	1893.	1892.
	Tons.	Tons.	Tons.	Tons.
Coal	174,024	162,123	14,648	15,279
Iron	3,082	2,437	..	..
Pitch	2,803	3,291	..	..
Timber	11,349	5,952	6,975	7,971

TABLE showing Total Value of Exports and Imports at St. Malo and St. Servan during the Years 1892-93.

Articles.	Exports.		Imports.	
	1892.	1893.	1892.	1893.
	£	£	£	£
Barley	Unknown.	200	Unknown.	..
Buckwheat		180		..
Butter		80,000		..
Eggs		140,000		..
Potatoes		45,600		..
Fruits		100,000		..
Coal		..		257,800
Iron		..		100,000
Pitch		..		..
Timber		..		..

NOTE.—Custom-house does not supply values of pitch and timber owing to variety of price and quality. The above are only approximate values.

Agriculture (St. Malo).

The extreme drought during early spring and summer made the season a trying and difficult one to farmers. Feed being very scarce, and the prospect of winter food very doubtful, animals depreciated much in value, indeed at one time were almost unsaleable. The thermometer stood very high all the summer, and on August 15 was at 105° Fahr. in the shade. Well farmed lands were very noticeable this year, as the drought was very trying to all crops.

The winter having been, with the exception of a few days, of a very mild character, the wheat crop was very forward in the early spring of 1893; but the great drought that set in during the month of March and which continued almost until July, though it advanced crops in general quite a month, as against other seasons, certainly prevented the growth of the straw everywhere in this district. The hot weather, however, being favourable to the flowering and also to the ripening, the grain was of good quality and abundant. Some wheat was cut near Paramé on July 1, and harvest was generally early.

Barley suffered a good deal immediately after sowing, and indeed, except here and there, did not revive from this first check, and continued drought made the crop deficient in general by one-third of an ordinary year.

Oats were a bad crop, both straw and grain. This crop is not much cultivated hereabouts, except for the requirements of farm horses.

Buckwheat was generally deficient from the same drought, and some of this grain was badly harvested.

Myatt's potatoes were deficient, owing to early drought, and

were small. Flukes were, however, a good crop and growers did very well. The culture continues to improve, and more artificial manure is used. There is a tendency hereabouts to repeat this crop too often on the same ground, which is likely to do harm in the end, though it may save present expenses in cleaning.

Hay. Hay was very deficient, dry ground hay being almost a failure, though well harvested and of good quality. Prices for hay have been very high in view of ordinary years.

Apples. Apples were a very plentiful crop and were ripe very early, being at first at a low price which increased later, apples not having kept as well as usual.

Mangel, &c. Mangel, carrots, and cow-cabbage, though at first a failure, were on the whole a fair crop, and autumn rains having brought about a favourable change for farmers, has enabled them to pass the winter much more easily than they expected.

Prices rule per 100 kilos.* as follows:—

Articles.	Currency.		Sterling.			
	From—		To—			
	Fr. c.	Fr. c.	£ s. d.	£ s. d.	£ s. d.	£ s. d.
Wheat	..	18 50	..	0 14 9½	0 14 9½	0 14 9½
Barley	16 0	17 50	0 12 9½	0 14 0	0 14 0	0 14 0
Buckwheat	13 0	13 25	0 10 5	0 10 7½	0 10 7½	0 10 7½
Oats	..	21 50	..	0 17 2½	0 17 2½	0 17 2½
Colza	28 0	30 0	1 2 5	1 4 0	1 4 0	1 4 0
Potatoes, round ..	..	5 50	..	0 4 5	0 4 5	0 4 5
" flukes (for seed) ..	..	15 0	..	0 12 0	0 12 0	0 12 0
Hay	..	160 0	..	6 8 0	6 8 0	6 8 0
Straw	..	140 0	..	5 12 0	5 12 0	5 12 0

* 100 kilos. = 1 cwt. 3 qrs. 24 lbs. 7 ozs.

DEPARTMENT OF LA SARTHE (LE MANS).

Mr. Vice-Consul de Veulle reports as follows on the trade of Le Mans, an inland town:—

Barley. This return shows a further decline in the export of barley, English brewers found prices here too high and good barley at cheaper rates in other countries.

Seed. Owing to the dryness of the summer, the agricultural seed crop was a failure, and farmers have had to buy American clover seed.

Fruits. The increase in the fruit export is natural with such an abundant yield as we have had, and yet much of the fruit remained in the country, the low price on the London market preventing the export trade.

RETURN of Principal Articles of Export from Le Mans during
the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
		£		£
Grain	Quarters 25,000	37,750	33,000	49,200
Seed.. ..	Sacks .. 1,000	4,000	3,000	12,000
Fruit .. ..	.. ..	9,000	..	6,000
Walnuts	Sacks .. 20,000	10,000	15,000	9,000
Eggs	Dozen .. 200,000	10,000	180,000	9,000
Poultry .. ..	.. ..	32,000	..	34,000
Other articles .. ..	.. ..	10,000	..	10,000
Total .. ..	.. ..	112,750	..	129,200

RETURN of Principal Articles of Import to Le Mans during
the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coal	40,000	56,000	37,000	49,950
Metals	..	12,000	..	14,000
Other articles	..	14,000	..	13,000
Total	..	82,000	..	76,950

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FRANCE.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF MARSEILLES.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1182.

*Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.*

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FRANCE.

MARSEILLES.

Mr. Perceval to the Earl of Kimberley.

My Lord,

Marseilles, March 28, 1894.

I HAVE the honour to enclose herewith my Commercial Report for the year 1893, including one from Mr. Ottley, Vice-Consul at Lyons.

I have, &c.

(Signed) CHARLES C. G. PERCEVAL.

*Report on the Trade and Commerce of the Consular District of
Marseilles for the Year 1893.*

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*Shipping and Navigation.*Shipping of
all nations.

The annexed table of shipping of all nationalities trading to the port of Marseilles during the year 1893 shows that the number of vessels and tonnage has decreased as compared with the previous year by 273 sailing vessels and 29,585 in tonnage, and 62 steamers and 45,474 in tonnage, a total falling-off of 335 vessels and 75,059 tons.

British
shipping.

An increase in the numbers and tonnage of British steamers is observable, amounting to 42 vessels and 139,653 tons, whilst the number of sailing vessels remains the same as in 1892. The average net register tonnage of our steamers has been 1,563 tons, an increase amounting to 123 tons over the previous year's average, and the British steam tonnage entered during the year has exceeded that of all other nations combined, excepting the French, by 285,282 tons.

Freights.

During the whole year freights have been low. Towards the end of the period the Black Sea freights rose slightly in

anticipation of the proposed extra duty on foreign grain, which has since been imposed.

The cargoes of the ships under the British flag have been mainly composed as follows:—Coal from the United Kingdom, of which 318,500 tons have been imported in English vessels; wheat from the Black Sea and India, sulphur, ground-nuts, palm oil, coprah, rice, sugar, and general. The steam colliers have, as in former years, sailed hence in ballast for the Black Sea, Spanish and Algerian ports seeking freight.

In comparison with the figures for 1892 the French vessels show a falling-off of 229 sailing vessels and 16,998 tons, and of 116 steamers and 188,916 tons, making a total diminution of 345 vessels and 205,914 tons.

A falling-off in ships and tonnage is also to be observed in the following nationalities:—Spanish, 63 ships and 34,754 tons; Italian, 24 ships and 40,583 tons; Swedish and Norwegian, 14 ships and 5,337 tons; German, 12 ships and 7,932 tons; Danish, 6 ships and 2,273 tons; and Portuguese, 12 ships and 33,222 tons.

On the other hand, an increase in shipping and tonnage is observable in the following nationalities as compared with the previous 12 months:—Dutch, 7 ships and 11,120 tons; Austrian, 52 ships and 43,745 tons; Greek, 30 ships and 49,197 tons; Russian, 6 ships and 4,122 tons; Turkish, 2 ships and 4,698 tons; Belgian, 2 ships and 2,631 tons; United States, 0 ships and 156 tons.

The number of passengers arriving at Marseilles by sea, exclusive of military and prisoners, was, during the last 2 years, as follows:—

Year.	Number of Passengers.
1893.. .. .	102,132
1892.. .. .	105,468
Difference in favour of 1892.. ..	3,336

The number of passengers leaving Marseilles was as under:—

Year.	Number of Passengers.
1893.. . . .	100,421
1892.. .. .	92,812
Difference in favour of 1893.. ..	7,609

During the year 1893, 3,970 emigrants, of which 434 were of French nationality and the remainder chiefly Italians, left Marseilles by sea for the United States and Brazil.

Marseilles
sailors' home.

According to the 14th annual report of this establishment, which has been recently published, it appears that during the year 1893, 4,649 meals were supplied, and 673 meals were given gratuitously to destitute seamen; 269 men have slept at the home; 24 men have received 216 nights' lodging free, and the total number of days' board and lodging supplied was 1,546.

The number of men who use the reading-room at the home is on the increase, and frequent entertainments take place for their amusement, whilst on Sunday evenings Divine Service is held there, and the attendance is good.

The institution is doing a deal of good amongst our seamen, and is under the superintendence of a committee formed of the principal English merchants and the Consular chaplain.

Trade and Commerce.

Imports.

The total imports for the year 1893 have attained 2,664,324 tons, against 2,550,254 tons in 1892, an increase of about 100,000 tons, which falls chiefly on wheat.

Wheat.

Imports of wheat were in all 667,755 tons, as against 563,045 tons in 1892. Of this total Russia alone sent 415,902 tons, against 197,312 tons in 1892.

The most conspicuous feature of the wheat trade in 1893, and one of such importance as to almost dominate the same, is the preponderance assumed once more by Russian wheat in Marseilles. The withdrawal of the ukase prohibiting grain exports from Russia, although it had taken place towards the middle of 1892, seems to have had its full effect this year. Large sales were made, stretching over several months, while prices remained at much the same level until heavy arrivals began to weigh on the market, and in the beginning of summer the Russian crops were safely assured, promising a yield of unprecedented magnitude. These circumstances, coinciding with the promise of fair crops in the principal consuming countries, caused a fall in prices, and a downward movement set in which continued until the end of the year. At the same time the monetary and silver crisis in the United States, the most intense ever witnessed there, contributed to the decline which even the deficit in America's crops was not sufficient to arrest.

At the close of the year the prices of wheat were the lowest ever experienced, but towards the end a steadier feeling prevailed in anticipation of a new duty being raised in France.

For those who anticipated and discounted a fall in values the trade has been brisk and profitable, whilst, on the other hand, millers, who are at all times obliged to hold a stock, have not fared so well as might have been expected, although they have been in full activity all through the year.

Maize.

Imports of maize have been 73,705 tons, against 54,891 tons in 1892, an excess of 19,000 tons.

The requirements and consumption of maize have been considerably larger by reason of drought and failure of hay crops in the spring and summer. Switzerland especially bought large quantities here, the drought in that country being so disastrous as to oblige the Federal and Cantonal Governments to purchase maize and let the farmers have it at cost price, with certain reductions on railway tariffs and facilities of payment in order to avoid their ruin. However, there was evidently a miscalculation of requirements, seeing there are yet about 35,000 tons of maize in stores for Government account. The market price having considerably declined, it means a serious loss to Swiss taxpayers.

Imports have also increased in the same proportion as ^{Oats.} maize, 59,457 tons, against 32,352 tons in the previous year. Oats experienced the same effect from the drought as maize. Considerable excitement in buying was displayed during the summer, and certain qualities were paid for at dearer prices than wheat; but soon Russia came forward with very large offers, and the demand was not only satisfied, but prices experienced an uninterrupted decline.

This article has also been imported on an unusual scale, the ^{Barley.} bulk coming from Russia at a successive fall in values. The total imports for 1893 have been 59,457 tons, against 32,352 tons in 1892.

There is an increase of 25,942 tons in imports, which have ^{Oleaginous seeds.} attained 363,674 tons, against 337,732 tons in 1892. The surplus has been chiefly ground-nut kernels and gingelly seed from Madras Coast, Bombay, and Kurrachee.

This important branch of trade and industry has been a flourishing and profitable one throughout the year, the whole of said imports having been crushed in local mills, which were kept fully occupied, while during the same period the demand for oils and oil-cakes remained steady, fully equal to the output, so that crushers met with a ready sale of their products. Indeed, the year opened with very moderate prices for seeds, and the bulk of purchases were made at an average cost of 22 fr. 50 c. to 22 fr. 75 c. per 100 kilos. for decorticated ground-nut kernels, which produce the chief oil provision for the soapworks. At this cost crushers can sell their oils at 45 fr. and cakes 14 fr. per 100 kilos., whereas the average sale price over the year ranged from 46 fr. to 47 fr. for oil, and from 14 fr. 50 c. to 15 fr. for cakes, thus increasing proportionately the profits to crushers.

The quantity of ground-nut kernels imported and crushed here was 96,388 tons decorticated kernels, or 1,400,000 bags of 74 kilos. each, and 36,289 tons undecorticated kernels in the shell. Of gingelly seed 108,000 tons were imported, against 77,800 tons in 1892.

Reports on the new crops are very favourable for 1894, and it is now estimated that from the French possessions on the Coromandel Coast 1,000,000 bags (75,000 tons) decor-
(1722)

ticated kernels will be available for export, of which nine-tenths are shipped to Marseilles. From Bombay also very large crops are reported and 45,000 tons may be given as the likely import to Marseilles. Admitting these estimates as fairly correct a further large increase may be expected in the coming year. Already very large sales have been made for next year delivery, and crushers have secured a full half of their requirements at a cheaper average cost than last year, viz. 20 fr. 50 c. per 100 kilos. for Coromandel decorticated kernels.

During the first 4 months of the year crushers were favoured with a steady rise in the value of seeds and oil, which advanced from 21 fr. for kernels and 45 fr. for oil, in January to 25 fr. for kernels and 52 fr. for oil in April; it is during these 4 months that the bulk of sales are made for monthly supply to the soap-makers, so that the mills then assured their work for the year at remunerative prices, and it is calculated that on the average the mills made 4 fr. to 4 fr. 50 c. per 100 kilos. of seed crushed, whereas 3 fr. to 3 fr. 50 c. is considered a satisfactory working return.

Cotton-seed. As a natural result of the increased imports of ground-nuts and gingelly, those of cotton-seed fell off and attained only 20,700 tons against 24,500 tons in the previous year. The bulk of the oil produced from these imports is of a very refined quality, and is chiefly used for mixing with the stronger olive oils to give a milder and sweeter taste. This oil is bought mostly by the town of Salon, the centre of the olive oil trade.

Castor-seed. There is a small decrease in imports, which have been 20,700 tons against 24,500 tons in 1892, but this may be attributed to less favourable crops as, otherwise, the mills which produce this special oil have been in full activity throughout the year, and crushers found a ready clearance of their oils, chiefly to England and Scotland among cloth manufacturers. Prospects are reported very favourable for the new crops from Bombay as well as from the Madras Coast.

Coprah and palm kernels. In my last year's report I held forth the prospect of a considerable shortage in supplies, especially over the first 6 months, which proved correct. Indeed imports only aggregated to the end of June 20,000 tons of coprah against 34,000 tons during the same period in 1892. For the 12 months the total imports were 46,634 tons of coprah and 18,806 tons of palm kernels against 61,844 tons and 17,523 tons respectively in 1892, or a deficit of 15,000 tons. This deficit falls chiefly on imports from Singapore, Penang, and Java. As coprah yields 65 per cent. oil on the average, a shortage of 15,000 tons raw material means about 10,000 tons diminution in the output of oil. The natural consequence of this deficit was a proportionate enhancement in values, and from 35 fr. for coprah and 52 fr. for oil at which the year opened, prices rose unabatedly to 40 fr. 50 c. and 63 fr. at the end of July. These prices were maintained without serious fluctuations until towards the end October when larger supplies began to arrive, and prices

receded steadily until the end of the year, closing on December 31 at about the same level as in January, viz. 35 fr. 50 c. for coprah and 52 fr. 50 c. for oil.

The trade has been, on the whole, profitable, as although the largest mills did not work their full capacity over the first 6 months, crushers gained full compensation in the fuller values at which they sold their products. Prospects for the coming year are much more favourable in respect of supply, as from all parts of the Malay Archipelago as well as from Java crops are said to be very promising. This year Java had no crop of importance, and very little was available for export, whereas the trees are now said to be in full bearing, which may mean an export of 25,000 tons to 30,000 tons, about the same as in 1891.

Imports of palm oil regained their average and attained 16,235 tons against 13,000 tons in 1892. Tallow shows a deficit, only 4,904 tons against 5,494 tons in 1892. Palm oil and
tallow.

The bulk of these imports has been consumed by local stearine and candle manufacturers, and, in addition to these, I think it must be mentioned that among the imports of oil-seeds are comprised about 12,000 tons of mourah seed and illipe nuts, which yield a concrete oil containing a large percentage of stearine. In round figures the yield of these 12,000 tons of seeds and nuts may be put down at 6,000 tons oil, which sold considerably cheaper than tallow, and were all consumed by the same candle manufacturers as a good substitute for tallow and palm oil.

About 75 per cent. of the imports of palm oil are shipped by French factories on the West Coast of Africa owned by Marseilles firms, and the other 25 per cent. come from English factories on the same coast. I may also mention a new product imported from China this year, called vegetable tallow, which is obtained from a nut grown in China and crushed in the country. In substance it is much the same as mourah and illipe oil and well suited for mixing with these. About 2,000 tons have been imported and there is promise for a large increase.

Crops all round were good and imports from abroad have again decreased, 13,454 tons in 1893 against 15,909 tons in 1892. Olive oil.

By reason of the plentiful output of other oils from local mills, and also large supplies of olive oils, there has been less demand for cotton oil, and imports have been 12,522 tons against 15,974 tons in 1892. Cotton oil.

There is a further increase in imports, especially from Turkestan and Armenia, in all 17,214 tons having been imported here against 14,768 tons in 1892, and 15,302 tons in 1891. Wool.

I think it may also be of interest to give silk a special mention as a large trade is carried on here in the sale of imports from China, Turkestan, and Armenia. The imports in 1893 comprised 10,217 tons raw silk and 795 tons cocoons. Silk.

Sugar.

Imports show a large increase for French colonial which has been 60,411 tons cane-sugar against 44,312 tons in 1892, whilst, on the other hand, there has been a very considerable diminution in imports of foreign colonial, viz., 27,700 tons against 54,381 tons in 1892. The total has thus been 88,122 tons in 1893 against 98,693 tons in 1892.

The deficit falls chiefly on imports from Java which refiners bought sparingly owing to the dearer prices at which this sugar ranged and fetched for American and British markets. French colonial was comparatively cheaper in its first cost, irrespective of the smaller duty, and as crops were good, the colonies of Martinique, Guadeloupe, and Bourbon benefited to a large extent by the larger purchases made there.

Besides these imports of cane-sugar local refiners have bought in the north of France their usual supply of beet sugar, and both refineries have been kept in full activity and given their average output although there has been a falling off in exports, chiefly to the Brazils and River Plate owing to the troubled state of affairs there. Both refineries are very prosperous and the year's work and results have been good and profitable.

Coffee.

There has been a falling off of 2,300 tons, which may be attributed entirely to the troubled state of politics in Rio and Santos, whence supplies have been very irregular and uncertain. Otherwise a good steady trade has been carried on with other coffee-growing countries, and in all 19,479 tons have been imported in 1893 against 21,751 tons in 1892.

Rice.

A further large increase has been witnessed in imports of rough rice, especially from Saigon, which comes in free of duty; the year's imports of rough rice have been 34,642 tons, against 26,136 tons in 1892, and only 3,226 tons in 1891. Of cleaned rice Marseilles has imported 15,093 tons in 1893 against 6,936 tons in 1892. Of the above quantities Saigon has supplied 22,196 tons of rough rice and 7,632 tons of cleaned.

This branch of industry has not been prosperous, as the quantity imported has been in excess of requirements, and millers have been compelled to compete with each other at a successive fall in prices. Not only this, but it is hard to compete against direct imports of cleaned rice from Saigon, where labour is cheaper than here, and with low freights by steamers returning from Tonkin, cleaned rice is bought and sold at Marseilles at lower prices than millers can afford to offer their output. Cleaned Saigon rice, No. 1 quality, which stood at 24 fr. per 100 kilos. on January 1, is selling at the close of the year at 17 fr. The largest rice mill in Marseilles was destroyed by fire in November, and as the trade is so unprofitable to millers it is not likely to be reconstructed.

Wine and spirits.

The imports of wines and spirits show a further decrease and only attained 110,498 tons against 135,717 tons in 1892. This falling off may be attributed to the large crops in France,

estimated at 54,000,000 hectolitres; but although rich in quantity the wine has been poor in quality, inasmuch as the bulk of ordinary wine is concerned, having no strength for keeping. Consequently large quantities have been forced on the market for sale, and prices declined as much as 50 per cent. for ordinary table wine and from 20 per cent. to 25 per cent. for finer wines. Some wines have been sold as low as 5 fr. to 6 fr. per hectolitre. The quantity imported from Spain for mixing purposes has been much the same, about 27,400 tons against 28,784 tons in 1892, but imports from Algeria have only been 62,585 tons against 81,478 tons in 1892.

By reason of large crops in France the imports of currants **Currants and raisins.** and raisins have fallen off very seriously, only 27,082 tons against 43,428 tons in 1892.

The quantity of coal imported from Great Britain in 1893 **Coals and freights.** amounted to 429,171 tons, of which 358,300 tons from South Wales and 70,871 tons from Newcastle-on-Tyne.

The average selling price was 19s. per ton free on board, England or Wales, but the price varied considerably owing to the strike in South Wales, when supplies here were nearly exhausted. Even after the miners resumed work at the pits it was for some time difficult to obtain shipments, and the free on board value in Cardiff was put up considerably, which greatly interfered with business here. Still the full average quantity has been imported and the average freight over the year has been 9 fr. per ton.

Among other large imports I may mention raw sulphur, **Other articles.** 35,476 tons; cotton manufactured goods from England, 8,522 tons; sulphate of copper, 5,800 tons; tin, 2,791 tons; beans and peas, 31,485 tons.

Owing to drought and failure of the hay crops, very extensive quantities of hay were imported to Marseilles from Italy **Hay.** as well as from Algeria, Russia, and different parts of the Levant.

As shown in the annexed table the total exports from **Exports.** Marseilles during 1893 have been 1,582,348 tons against 1,614,796 tons in 1892, or a falling off of about 32,000 tons.

Favoured by large crops in France and low prices, the **Wine and spirits.** exports from Marseilles gained a considerable increase, and 39,617 tons have been shipped from Marseilles against 32,352 tons in 1892. This increase would have been much larger if shipments to Brazil and River Plate had not been interrupted by the troubled state of politics and financial difficulties in those countries.

There is an increase of 8,500 tons in exports of flour, which **Flour.** have attained 52,775 tons against 44,238 tons in 1892. In proportion with the substantial fall in wheat, the export price of flour ranged very low during all the year.

By reason of the drought and short crops of hay in France **Oil-cakes.** much larger quantities of oil-cakes have been consumed in the country to the detriment of exports, which have been

11,500 tons less, viz., 59,645 tons against 71,162 tons in 1892. The bulk of these exports consists of ground-nut kernel cakes, of which Germany and Scandinavia are the largest buyers, for cattle food. The price stood high throughout the year by reason of the much smaller quantity available for export, and the average selling price has been from 14 fr. 50 c. per 100 kilos., f.o.b., at Marseilles.

Oils. Exports of oils are 5,600 tons less than in the previous year, 46,247 tons in 1893 against 51,810 tons in 1892. This deficit may be attributed partly to the very large crops of olive oils in Italy, Spain, and Tunis, but chiefly, I think, to the fact that in Spain and Italy new oil mills have been started, which supply the requirements hitherto covered from Marseilles. The quantities of oil chiefly exported from Marseilles are: sesame oil, 14,708 tons; olive oil, 8,488 tons, both for edible purposes; coprah oil, 9,129 tons, for soapmakers; and 5,525 tons of castor oil, mostly to England and Scotland, for cloth manufacturers.

Soap. The quantity of soap exported has been much the same as in the previous year, viz., 12,654 tons against 11,269 tons in 1892. This very important branch of industry continues very prosperous in Marseilles, and the year's production of the numerous local mills may be given at 14,000 tons.

Candles. The exports of candles have been 4,867 tons against 5,918 tons in 1892.

Refined sugar. By reason of the unsettled state of affairs in Brazil exports of refined sugar from Marseilles have been seriously curtailed during the latter part of the year, and the total exports have been about 8,000 tons less than in the previous year, viz., 34,662 tons against 42,558 tons in 1892.

Ceramic industry. There is no change of remark, and exports have not yet regained their previous importance. This year's exports have been much the same as last year's, 99,600 tons against 97,344 tons.

Other articles. Under this heading are comprised all exports of manufactured or other articles from different parts of France, which are sent down to Marseilles for shipment by the numerous and extensive lines of steamers serving this port.

Custom-house receipts. The custom-house receipts amounted during the year to 3,866,416*l.*

Octroi receipts. The octroi receipts were 455,111*l.*

Ship-building. During the year under review a steamer, the "Ernest Simon," was built at the Messageries Maritimes Company's yard at La Ciotat, and three tugs at Messrs. Fraissinet's yard for the Chambon Company.

Public Works.

Drains. Great progress has been made in the extensive drainage works mentioned in my last report, 72 kiloms. of drains having been completed, and 150 kiloms. to be done still. The work is

1 kilom. = 1,093·633 yards.

carried on day and night, and the rate of progression is from 5 to 6 kiloms. per month.

The railway, mentioned in my last report, which extends from the centre of the town to La Blancarde and St. Pierre on the outskirts, and which passes through a tunnel of more than a mile in length, has been completed, and was opened for traffic on December 20. This railway will be a great convenience, especially as the cemetery is at St. Pierre. The engines employed on the trains burn patent fuel, and have a smoke-consuming apparatus.

Railway to
La Blancarde
and St. Pierre.

MOVEMENT of the Population.

Year.	Births.	Marriages.	Deaths.
	Number.	Number.	Number.
1892	11,512	3,190	11,587
1893	11,523	3,196	12,159
Total	+ 11	+ 6	+ 592

It will thus be seen that the numbers of births and marriages are slightly on the increase, and that the death-rate has also increased as compared with that of the previous year, which may be accounted for by the prevalence of influenza and its consequences, lung diseases, &c., and also the cholera.

LYONS.

Mr. Vice-Consul Ottley reports as follows:—

This has been a remarkable year, and one which will be Silk industry. memorable for all interested in the silk industry.

It opened full of promise; the upward movement in prices which marked the close of 1892 was continued and accentuated by increased activity in all branches. Buyers of piece-goods were encouraged by the advancing prices to place orders more freely, production was stimulated, and a feeling of confidence was manifested on all sides.

Progress of
the rise.

This favourable condition of affairs continued until the period of the new crop, the progress of which was naturally followed with much interest and discussed from various points of view; but optimist opinions prevailed, and high prices were paid in France in the first instance for the new cocoons.

First price of
cocoons.

The fine season was especially favourable to the crop, which proved to be universally abundant and of good quality (it has since been stated that the Italian crop was 35 per cent. superior to the yield of the preceding year), and prices began to give way.

Abundant
crop.

Reason of decline.	Asiatic silks became depressed by the continued decline in silver, and in June the financial crisis in the United States led to many cancellations of goods on this market, and, by causing the abstention of American buyers from the Yokohama market, increased the visible supply for Europe.
Result of abstention of buyers.	To these direct causes must be added the effects of the general commercial depression existing in so many centres of consumption, with the result of a reaction on the part of all buyers, and business reduced to a minimum.
Reduction in value.	Some idea may be formed of the fluctuations to which the market has been subjected when it is considered that from the beginning of the upward movement, about July, 1892, to its high-water mark in May last, the advance in European silks has been estimated at 70 per cent., and that by the close of the year the whole of this plus value had disappeared, involving most serious losses to the various stages of production interested; indeed, the only persons who would seem to have profited by the optimistic view of the first half of the year were the silk farmers, or producers of the cocoons.
Trade of the year.	The official figures of the Lyons Chamber of Commerce do not show any appreciable diminution in the value of the manufactures for 1893. The total is 15,170,000 <i>l.</i> , which is practically the same as the preceding year, from which we must conclude that the diminution in production, perceptible during the closing half of the year, had been compensated by the greater activity and higher prices ruling during the first 6 months. If, however, the output of the year were calculated on the prices of 1892, it is estimated that the total would not exceed 14,000,000 <i>l.</i>
Classes of goods produced.	The articles which have been most favoured, and which show an increase in value, are plain goods, all silk, dyed in the yarn, such as moirés, satins, taffetas, failles, and velvets. Brocaded goods appear to have declined somewhat in amount, as have also piece-dyed and printed goods of the Pongee and Foulard class. The demand appears to have also been less for crapes, gauzes, tulles, lace, and passementerie. There has been a little improvement in satins, shot cotton and dyed in the piece, though this branch is still far from its former prosperity.
Spanish tariff.	The treaty which Spain has accorded to Switzerland and Germany is interesting to this market, which profits under the favoured-nation clause. Plain silk goods will now pay 17 fr. 50 c. a kilo. instead of 25 fr.; mixed silk and wool 8 fr. 50 c., instead of 12 fr. 50 c. duty.
Imports.	The imports of silk goods are in amount one-fifth less than in 1892; the total is, in round numbers, 2,000,000 <i>l.</i> The decline is attributed to the duty.
Exports.	The exports were, in round numbers, 8,500,000 <i>l.</i> , against 10,000,000 <i>l.</i> in 1892. The falling-off is largely to be accounted for by the diminution in the amount taken by the United Kingdom, 3,500,000 <i>l.</i> against 4,700,000 <i>l.</i> The United States, with a total of 2,400,000 <i>l.</i> , show an increase of 7½ per cent.; Germany, with 800,000 <i>l.</i> , an increase of 5 per cent.; Switzer-

land, with 300,000*l.*, a falling-off of 25 per cent., owing to the hostile tariff; Turkey comes next with 170,000*l.*, being little more than half the preceding total; other countries, aggregating 1,260,000*l.*, show a decline of 16 per cent.

On April 26, 1894, will be opened in Lyons a Universal, ^{Lyons} International, and Colonial Exhibition, which, in addition to a ^{Exhibition.} very complete display of all the fabrics for which the city is famous, will contain illustrations of a very interesting and instructive character of the various branches of industry connected with silk manufacture. The Chamber of Commerce will make an exhibit "ab ovo" of all the stages of cocoon-growing.

There will be very complete exhibits of French, Italian, and Asiatic raw silks.

The various processes of spinning, throwing, dyeing, preparation of warp and weft, beaming, mounting of the looms, reading of designs, will be set forth, and a variety of looms, hand and power, the latter put in motion by electricity, will be shown in working order. Amongst others, an electric ribbon loom (St. Etienne), a braid loom (St. Chamand), and an embroidery loom (St. Gall).

In addition to this illustrated monography of the trade, the machinery annexed will show private exhibits of special systems for spinning, throwing, dyeing, drying, and lustring silk. Chemical products used in dyeing will also form an exhibit.

It is purposed that the Exhibition shall furnish useful matter for the careful study of working men delegates, as exemplifying the conditions of industry and labour in this district.

The Government is asked to grant a subvention of 8,000*l.*, of which 800*l.* is to be set apart for the use of these delegations, the sum to be at the disposal of the Minister of Commerce, acting under the advice of a special committee nominated to this intent.

The Exhibition may probably present some interest to those who are desirous of seeing a revival of silk manufacture in the United Kingdom.

RETURN of the Principal Articles of Import and Export to and from Marseilles during the Years 1893-92.

IMPORTS.

Articles.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Wheat	667,755	568,045
Maize	73,705	54,891
Oats	59,457	32,352
Barley	44,216	11,836
Oil seeds	863,674	837,732
Palm oil	16,235	12,995
Tallow	4,904	5,494
Olive oil	13,454	15,909
Cotton oil	12,522	15,974
Sugar	88,122	98,693
Coffee	19,479	21,751
Wine, spirits, and beer	110,498	135,717
Codfish	8,657	2,939
Coal (United Kingdom)	429,171	422,600
Other articles	757,475	818,326
Total	2,634,324	2,550,254

EXPORTS.

Articles.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Wine, spirits, and beer	39,617	32,352
Wheat	47,181	33,303
Flour	52,775	44,238
Oil-cakes	59,645	71,162
Soap	12,654	11,239
Oils	46,247	51,810
Candles	4,887	5,918
Refined sugar	34,652	42,558
Ceramic industry	99,600	97,344
Other articles	1,185,100	1,224,842
Total	1,582,348	1,614,796

RETURN of all Shipping at the Port of Marseilles during the
Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	11	6,487	644	1,006,696	655	1,013,183
French	1,846	177,378	3,714	2,613,568	5,560	2,790,946
Spanish	90	8,367	247	202,926	337	211,283
Italian	465	101,110	89	80,731	554	181,841
Dutch	2	2,242	67	108,508	69	110,750
Swedish and Norwegian	50	25,505	68	51,154	118	76,659
Austrian	63	27,314	91	71,299	154	98,613
Greek	124	34,446	106	115,948	230	150,394
German	9	7,468	42	53,325	51	60,793
Russian	10	5,650	2	1,358	12	7,008
Danish	5	1,687	16	13,421	21	15,108
Turkish	5	801	8	9,341	13	10,142
Belgian	...	...	3	3,880	3	3,880
Portuguese	2	1,082	7	9,523	9	10,605
American	2	1,117	...	...	2	1,117
Total	2,684	400,644	5,104	4,841,678	7,788	4,742,322
„ for the year preceding	2,957	430,229	5,166	4,387,152	8,123	4,817,381

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	8	4,316	642	975,744	650	980,060
French	1,879	176,414	3,712	2,585,322	5,591	2,761,736
Spanish	89	8,235	246	201,056	335	209,291
Italian	470	108,856	88	80,185	558	189,041
Dutch	2	2,242	67	108,508	69	110,750
Swedish and Norwegian	4	1,956	40	20,787	44	22,743
Austrian	46	17,627	67	48,036	113	65,663
Greek	131	37,851	99	107,583	230	145,434
German	7	5,770	42	51,658	49	57,428
Russian	7	3,886	2	1,358	9	5,244
Danish	5	1,687	16	13,421	21	15,108
Turkish	6	962	8	9,341	14	10,303
Belgian	...	...	3	3,880	3	3,880
Portuguese	2	1,082	7	9,523	9	10,605
American	2	1,117	...	...	2	1,117
Total	2,658	372,001	5,039	4,216,402	7,697	4,588,408
„ for the year preceding	2,933	424,651	5,185	4,348,022	8,118	4,772,673

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FRANCE.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF BREST.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1177.

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1285. Washington	4½d.	1346. Trebizond	1d.
1286. Warsaw	½d.	1347. Algiers	3d.
1287. Peking	½d.	1348. Amapala	½d.
1288. Amsterdam	1d.	1349. Cherbourg	1d.
1289. Matua	2½d.	1350. Jerusalem	1d.
1290. Batavia	1d.	1351. Santiago	1d.
1291. Marseilles	1d.	1352. San José	1d.
1292. Trieste	1½d.	1353. Trieste	3½d.
1293. Lyons	4d.	1354. Madrid	2d.
1294. Montevideo	1½d.	1355. Teneriffe	½d.
1295. Belgrade	2d.	1356. Havana	2d.
1296. Teneriffe	1d.	1357. Paraguay	5d.
1297. Saigon	1d.	1358. Guayaquil	4d.
1298. Rome	2½d.	1359. Cava	1½d.
1299. Dantzig	7d.	1360. Marseilles	1½d.

No. 1361.

Reference to previous Report, Annual Series No. 1177.

FRANCE.

BREST.

Consul Hoare to the Earl of Kimberley.

My Lord,

Brest, April 3, 1894.

I HAVE the honour to transmit herewith my Commercial Report for the year 1893.

I have, &c.
(Signed) W. R. HOARE.

Report on the Trade and Commerce of Brest for the Year 1893.

ABSTRACT of Contents.

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Trade and Commerce.

During 1893 the tonnage of British vessels (of which there were 50 steam and 8 sailing) entering the port of Brest exceeded by 2,485 tons that of the previous year, being 26,269 tons for 1893 and 23,784 tons for 1892, and about 57 per cent. of the whole foreign tonnage. It is a regrettable fact that nearly the whole of (1734)

General trade
of Brest;
British
proportion.

these vessels were obliged to clear in ballast from inability to obtain return cargoes.

The total value of foreign imports during the year was 252,408*l.*, less by about 27,000*l.* than in 1892. Of this, 119,824*l.*, or about 47 per cent., came from the United Kingdom.

The import of wines and spirits fell off 430,000 gallons, and of coal 10,000 tons, while of timber there was an increase of over 3,000 tons. Of the 20,000 tons which came from Russian and Swedish and Norwegian ports, British vessels brought nearly half. The diminished import of spirits and wines was largely due to accumulation of stocks, and that of coal to the high prices and uncertainty of supply caused by the English colliery strikes. The total quantity of British coal imported during the year, two-thirds of which came from Cardiff, was about 50,000 tons, 35,000 tons being brought in British, and the remainder in French vessels. The French Government having recently decided that only French coal shall be used in future for the War Department, placing it in that respect on the same footing as the Marine Department, a reduced import of British coal, which has been accepted heretofore, may probably be expected of some 7,000 or 8,000 tons.

The exports from Brest to foreign countries in 1893 were of the aggregate value of 48,925*l.*, of which 45,375*l.*, or 92 per cent., went to Great Britain.

Of potatoes there was a decreased shipment of 3,000 tons from Brest, and also a large decrease in the exports of these and other vegetables from Morlaix. Prices having at times been higher here than in England, there was a less demand than usual for them.

The strawberry crop suffered considerably from the long drought, and the quantity shipped hence direct to England was much less than in the previous year.

Increased
imports of
guano.

About 3,000 tons of guano and phosphates were imported at Landerneau from England last year. This was a large and unexpected increase. Cultivators in this part of Finistère are apparently beginning to comprehend the advantages to be derived from the judicious use of such powerful aids to agriculture, and if the opportunity is availed of, imports of natural and artificial fertilisers may be still further augmented.

Discon-
tinuance of
French
steamship line
to Swansea.

A small fast British steamer, the "Gipsy," of 81 tons, chartered under French auspices, commenced running early in May last between Douarnenez and Brest and Swansea, as an experiment, and in the hope that it would lead to the establishment of a permanent and more frequent service for the transport of farm and dairy produce, fruits, &c., to the English markets direct from the lower Brittany ports. Lorient was the point of departure originally intended, but the prevalence of cholera there necessitated a change of arrangements.

The steamer made the round voyage weekly until October 1, when it was discontinued for the reason, as publicly announced, that the regularity of the service could no longer be assured on account of the cholera epidemic in Brittany. There is at present no indication of a renewal of the service, and it is surmised that

the true reason of its discontinuance was that it did not prove remunerative. The same was unfortunately the case with another, an English, line of steamers which ran between Cardiff and Plymouth and Locudy and Brest for some months in the previous year.

With the increasing development of the agricultural and other resources of this district by means of the light railways referred to hereafter, it is not improbable that another attempt may be made ere long to establish direct steam communication; and, with improved arrangements for the collection of produce and its transit to English markets at fixed low through rates, it is to be hoped it will meet with better success than the previous ones—at all events, be able to pay expenses until a really remunerative trade can be created.

Statistics of the commerce and shipping of Finistère, Côtes du Nord, and Morbihan according to the official customs returns, are given hereafter.

Shipping and Navigation.

Chenal du Four.—New lights have been established at Trézien and Corsen, which came into operation on January 1, 1894, and on the same date the new photophone of St. Mathieu also commenced operations. Lighthouses
and beacons.

A turret is in course of construction, to serve as a beacon, on Christian-Bras Rock, east of the Ile de Benniquet.

Port Térénes.—The iron beacon, "l'Annomer," on the coast of Tréguier, at the entrance of this port, which was washed away in November last, is to be replaced during the present year.

Morlaix River.—The large spit on the left bank of the river has been abolished.

Penzé River.—A red beacon has been constructed on La Tortue Rock in this river.

Ile aux Moutons Light.—This light has been altered to an occulting light, and its power has been much increased.

Concarneau.—The Batterie de la Croix and Beuzic lights have been also increased in power.

Port Douélan.—A black beacon, surmounted by a revolving day-mark, elevated 8 feet above high water, has been established on Lacroix Shoal, south-west of the port, near Beg an Tour Point.

Port Maria de Quiberon.—The construction of a lighthouse has been commenced, and will be finished in 1894.

Gulf of Morbihan.—A beacon tower has been placed on the Truie de Roguédas Rock.

Paimpol.—A lighthouse is being constructed on the Lost-Pic Rock, on the left side of the entrance to the channel of Paimpol. The light will probably be in working order in the course of 1894.

Penmarch.—The construction of a new lighthouse has been commenced at Eckmühl at the point of Penmarch, towards which the Marquise de Blocqueville, daughter of Maréchal Davoust, Prince of Eckmühl, left a handsome legacy of 300,000 fr. The structure will be of a very massive description and nearly 200 feet high. The old lighthouse will be left standing.

*Public Works.**Finistère.*

Railways:
Development
of light lines.

Departmental Lines.—The light railway from Brest to Ploudelmézeau was opened throughout for public traffic on July 31, 1893, the first section to St. Rénan having been operated a couple of months earlier.

A similar line to Llanilis was opened on February 25, 1894.

Another light railway from Audierne to Douarnenez, affording direct communication between Audierne and Quimper and other points on the Orleans and Western lines, was also completed and opened on January 28, 1894.

The line from Landerneau to Lesneven and Plouéour-Trez is nearly finished, and will be opened for traffic probably at an early date.

These narrow gauge lines, constructed on most economical principles, will undoubtedly be of great service to agricultural, fishing, and other industrial interests; and, being planted in good districts, they will naturally tend to create traffic to the benefit of their promoters as well as that of the community generally.

The traffic on the Ploudelmézeau line has already exceeded expectation, and there is reason to believe the receipts from the other lines will prove equally satisfactory. Short extensions of the Ploudelmézeau lines to Portsal, the Llanilis line to L'Abervrach, and the Lesneven line, when completed, to Brignogan, on the Channel coast, are in contemplation, and will probably be carried out ere long.

Other short departmental lines are projected, and much interest is being shown in this connection.

Line from Carhaix to Rosporden.—Work on this line is being proceeded with.

Extension to connect Morlaix Station with the Port.—Reference was made in my last commercial report to a proposed extension to connect the railway station with the port of commerce at Morlaix. As yet, however, nothing has been done in regard to it. The matter is still under consideration.

Côtes du Nord.

The new line from Guingamp to Carhaix was opened on September 24 last.

A line from Guingamp to Paimpol is in course of construction, and in all probability will be ready for traffic some time this year.

Work on the new line from Loudéac to Carhaix and St. Méen is to be commenced this year.

Morbihan.

In this department also several light railways are being projected. Plans have been prepared, and concessions will shortly

be given for lines from Ploermel to Plouay, from Locminé to La Roche-Bernard viâ Vannes, and from Lorient to Gourin viâ Plouay, work on these lines being proceeded with consecutively.

Other light lines are also in contemplation in this department.

The necessity of doubling the line between Rennes and Brest, a distance of about 155 miles, is being strongly urged by representatives of the local agricultural and commercial interests.

Proposed doubling of line between Brest and Rennes.

At present, with the exception of two short sections of about 24 miles between St. Brieuc and Guingamp, and Brest and Kerhuon, there is but a single track.

A second track would, it is represented, not only afford greater accommodation and quicker transit, which is much needed, for the products of this part of Brittany, but would also permit of a material acceleration, which is not possible under present circumstances, of the through passenger traffic. The estimated cost of the work is about 480,000*l.*, or, at an interest charge of, say, 4 per cent., 19,200*l.* per annum.

Population, Health, Industries.

A comparison of the population of the three departments of this Consular district in 1891 (last census) and the preceding 10 years is shown in the following table:—

Department.	Number.		
	1891.	1886.	1881.
Finistère	727,012	707,757	681,564
Côtes-du-Nord	618,652	628,256	627,585
Morbihan	544,570	535,256	521,614

An increase since 1881 is exhibited of 6·4 per cent. in Finistère, while in the Côtes du Nord there has been a decrease of 1·4 per cent., and in Morbihan of 4·4 per cent.

VITAL Statistics, 1892 (latest).

Vital statistics.

Department.	Number.		
	Birth .	Deaths.	Marriages.
Finistère	23,420	18,966	5,478
Côtes-du-Nord	16,577	14,592	4,660
Morbihan	15,564	11,322	4,172

A fresh outbreak of cholera occurred in Morbihan in the middle of March, 1893, which lasted till nearly the end of June, causing a mortality of nearly 300, so far as can be ascertained.

Health. Cholera in Morbihan and Finistère.

The department of Finistère, which had previously escaped the scourge, also suffered from it. The disease made its appearance first in the insane asylum and town of Quimper, and there were several deaths from it during April and May, when it ceased. Towards the latter end of June sporadic cases began to manifest themselves in Brest; they were not numerous, and great reticence was observed in regard to them till the middle of August, when, the disease assuming an epidemic form, and several deaths occurring daily in the city and suburbs, the actual state of the case could no longer be kept from the public. Places in the vicinity of Brest, as well as others more distant, were also about this time infected.

The mortality in Brest and its adjuncts, Annexion, and Recouvrance, during the period the disease was epidemic, *i.e.*, till towards the end of November, was, according to published reports, 332; and it was also very large at St. Pierre Quilbignon, Lambézellec, Kérinou, and other suburban towns, as well as in the Ile Molène, Camaret, Concarneau, and, in a lesser degree, in other communes of the Department.

Fisheries.

The sardine fisheries at Concarneau, Douarnenez, and Audierne were exceptionally good last season—better, indeed, than for many years, and the packing and tinning houses were kept well employed, and, as a large proportion of the fish were above the average size, the fishermen made good profits. Prices on the spot varied, according to the size of the fish and the fluctuation of the catch, from 8 fr. to 16 fr., and, at times, to 25 fr. per 1,000. The take of mackerel, whiting, and lobsters was also above the average. There was a reverse, however, to this prosperity during the winter months, when, on account of continuous tempestuous weather, fishing was very poor and precarious.

The number of boats engaged in fishing at the above-mentioned places was, at Concarneau, 500; Douarnenez, 700; and Audierne, 500. Altogether nearly 5,000 boats are employed in the fisheries at all points on the coasts of Finistère, and the total value of the fisheries is said to be about 480,000*l*.

Oysters.

The yield at Concarneau during November and December last was about 1,600,000, of which about one-half went to French markets, the remainder being exported to England, Belgium, and other countries.

The endeavours during the past few years to replenish the oyster beds at the mouths of the Rivers Elorn and Aulne running into the roadstead of Brest have not proved very successful, but they have, nevertheless, not been discontinued. A further number of 40,000 seed oysters from Bordeaux were put down in April last, which it is hoped will give a better result than heretofore.

Upwards of 1,000,000 oysters are said to have been taken from the Tréguier beds last year.

The trials made last year at Lannion (Côtes du Nord) of galvanised wire lobster pots proved that they possessed no advantages over the old-fashioned reed pots. Their cost was considerably more than the latter, and they became quickly oxidised, soon needing repairs, which the fishermen were unable to effect themselves, as they could do with their osier pots; and, moreover, these latter were found to last as long, if not longer, than the pots made of wire.

The flotilla which left Paimpol (Côtes du Nord) in the beginning of last month for the Iceland cod fishery, which is of considerable importance to the place, consisted of 72 vessels (including 12 "chasseurs"), manned by nearly 1,400 men.

The experiments which have been made in the Mediterranean with a simple and cheap contrivance, the invention of a Douarnenez fisherman, for the destruction of porpoises, which commit great havoc among sardines and other small fish, having met with a fair amount of success, the Government are about to distribute a number of the apparatus among the fishermen at different points on the Brittany coast, who will continue and report the results of the experiments here. The apparatus is described as being composed of two steel needles $3\frac{1}{2}$ inch to 4 inches long which are run transversely through a small rubber tube, and are then brought to and held in a parallel position by a piece of cotton thread or fine catgut. The needles are inserted in a sardine or other bait-fish, and when swallowed by the porpoise, the acids of the stomach, acting upon the thread, soon break it, the needles revert, or are supposed to revert, to their original crosswise position, and an obstruction or perforation of the intestines is caused which brings about the fish's death.

State Tobacco Manufactory, Morlaix.

In the tobacco manufactory at Morlaix there are over 1,000 employés, of whom 900 are women and 100 men.

The quantity of tobacco of all kinds manufactured annually here is about 2,200 tons.

State
Tobacco
Manufactory,
Morlaix.

Canal, Nantes to Brest.

TONNAGE Movement for 11 Months to November 30, 1893.

Nantes and
Brest Canal.

From—	Kilomètres.	Tons.
Nantes to Redon	95	249,810
Redon to Chateaulin	265	128,098

Agriculture.

The cereal crops, especially spring wheat, suffered considerably from the prolonged drought; other and later crops were less

Agriculture.

affected, having been benefited by the copious rains which supervened. Hay, straw, and all kinds of fodder were very scarce last season, and prices were high, and still continue so.

Returns of the cereal harvest in Finistère and the Côtes du Nord are appended hereto: the latter, however, cannot be accepted as altogether reliable. From Morbihan I have been unable to obtain any return for last year.

The cider apple crop, to which great importance is attached in Brittany, though not so abundant as that of 1892, was nevertheless a good one, that of Morbihan especially so. While the home consumption of cider is always very large, there is always a good demand for it from other parts of France, and the surplus stock usually finds a ready market. The prolific apple and pear crops of the last 2 years have well compensated for deficiencies in some preceding years.

TABLE showing the Quantity of Cereals Harvested in the Departments of Finistère and Côtes-du-Nord during the Years 1893-92.

Articles.	Finistère.		Côtes-du-Nord.	
	1893.	1892.	1893.	1892.
	Quarters.	Quarters.	Quarters.	Quarters.
Wheat	283,176	328,320	610,300	614,886
Meslin	35,616	33,858	58,100	58,100
Rye	165,528	229,058	184,700	184,700
Barley	113,202	177,840	171,500	162,450
Oats	331,398	431,002	588,240	820,800

Shipping and
commerce
statistics.

RETURN of all Shipping at the Port of Brest during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	8	2,391	50	23,768	58	26,159
French	82	5,567	15	7,684	97	13,251
Swedish and Norw.	6	3,191	4	2,112	10	5,303
Other countries	2	506	2	680	4	1,186
Total	98	12,125	71	33,900	169	46,025
„ for the year preceding .. .	141	13,768	60	33,003	191	46,771

BREST.

9

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	11	5,794	41	18,208	52	23,997
French	84	4,426	17	8,664	101	13,090
Swedish and Norwegian	2	1,386	5	3,081	7	4,467
Other countries	2	596	1	511	3	1,107
Total	99	12,202	64	30,459	163	42,661
„ for the year preceding	116	13,301	95	46,609	211	59,910

RETURN of Principal Articles of Export from Brest during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Eggs	215	8,601	247	9,900
Empty casks	..	..	170	1,700
Potatoes	7,897	31,587	11,000	43,700
Fruit	99	200	51	80
Rye	260	1,040	251	1,000
Buckwheat	1,375	5,496	..	..
Other articles	25	2,141	672	12,304
Total	9,871	49,065	12,391	68,684

RETURN of Principal Articles of Import at Brest during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wines and spirits ..	Gallons ..	584,000	53,097	914,860	83,160
Coal	Tons ..	50,214	72,000	60,541	86,000
Timber	„ ..	19,523	38,044	16,168	32,330
Vegetable tar	„ ..	289	1,167	237	949
Lobsters and fish ..	„ ..	280	22,435	286	20,230
Other articles	„ ..	7,899	65,675	8,320	56,969
Total	Gallons ..	584,000	252,408	914,860	279,638
„	Tons ..	78,205		85,552	

TABLE showing the Total Value of all Articles Exported from and Imported to Brest during the Years 1893-92.

Country.	Exports.		Imports	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	45,357	65,984	119,824	91,620
United States of America ..	..	..	6,075	16,100
Holland	..	..	1,070	696
Spain	..	1,700	51,938	65,068
Italy	..	..	48,793	39,124
Other countries ..	3,568	1,000	24,708	67,030
Total	48,925	68,684	252,408	279,638

RETURN of all Shipping at the Port of Morlaix during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	42	2,974	...	...	42	2,974
French	27	1,940	...	...	27	1,940
Russian	10	2,527	...	...	10	2,527
Swedish and Norwegian	2	346	1	384	3	730
Other countries ..	4	649	3	1,250	7	1,899
Total	85	8,486	4	1,634	89	10,070
„ for the year preceding ...	66	6,844	6	1,542	71	7,886

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	46	3,210	...	...	46	3,210
French	5	401	...	...	5	401
Russian	10	2,527	...	...	10	2,527
Swedish and Norwegian	2	346	1	384	3	730
Other countries ...	4	649	3	1,250	7	1,899
Total	67	7,136	4	1,634	71	8,767
„ for the year preceding ...	48	6,038	5	1,542	53	7,580

RETURN of Principal Articles of Export from Morlaix during the
Years 1893-92.

Articles.	1893.		892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Pit-props	1,425	1,120	1,160	650
Cereals	320	2,126	1,809	9,700
Potatoes	5,032	12,200	5,003	8,000
Vegetables	5,338	8,541	3,446	2,756
Other articles	67	2,680	151	3,090
Total	12,232	26,667	11,569	24,196

RETURN of Principal Articles of Import to Morlaix during
the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coal	10,094	16,148	8,550	11,972
Timber	5,919	18,464	5,223	21,000
Phosphates	836	1,920	..	..
Other articles	1,483	23,264	607	23,463
Total	18,332	59,796	14,380	56,435

TABLE showing the Total Value of all Articles Exported from and
Imported at Morlaix during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892
	£	£	£	£
Great Britain	23,977	21,300	17,593	12,200
Sweden and Norway	..	..	9,088	16,000
Germany	..	596	816	..
Russia	..	..	10,113	4,800
America	..	..	16,100	15,252
Other countries	2,700	2,800	6,086	8,183
Total	26,677	24,196	59,796	56,435

RETURN of all Shipping at the Port of L^gué (St. Brieuc) during
the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	102	7,576	99	7,431	201	15,007
French*	375	11,797	79	7,416	454	19,213
Russian	7	1,746	...	...	7	1,746
Swedish and Norwegian	13	3,101	...	...	13	3,101
Other countries	4	344	1	197	5	541
Total	501	24,564	179	15,044	680	39,608
„ for the year preceding	411	22,279	190	15,403	601	37,682

* This includes coastwise vessels.

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	99	7,579	97	7,117	196	14,696
French*	375	11,823	79	7,416	454	19,244
Danish	6	759	...	...	6	759
Swedish and Norwegian	13	3,067	...	...	13	3,067
Russian	2	450	...	...	2	450
Other countries	12	1,131	2	314	14	1,445
Total	507	24,804	178	14,847	685	39,651
„ for the year preceding	423	22,721	191	15,567	614	38,288

* This includes coastwise vessels.

TABLE showing the Quantity and Value of Exports from Le L^gué
(St. Brieuc) during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Various.. ..	11,460	64,678	19,523	143,016

TABLE showing Quantity and Value of Imports at Le L^gué
(St. Brieuc) during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Various.. ..	25,014	79,328	29,063	74,388

RETURN of all Shipping at the Port of Lorient during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	5	1,394	5	1,394
French	28	2,981	10	1,238	38	4,219
Swedish and Norwegian	15	2,510	...	...	15	2,510
Other countries	6	1,147	...	...	6	1,147
Total	49	6,638	15	2,632	64	9,270
„ for the year preceding	58	7,301	8	4,013	66	11,314

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	4	1,291	4	1,291
French	42	5,581	15	4,166	57	9,747
Swedish and Norwegian	15	2,531	2	718	17	3,249
Other countries	5	934	1	177	6	1,111
Total	62	9,046	22	6,352	84	15,398
„ for the year preceding	58	7,252	14	7,809	72	15,061

RETURN of Principal Articles of Import to Lorient during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coal	10,856	18,056	12,774	12,774
Timber	3,609	5,040	658	1,752
Cod roes	1,482	21,400	1,715	4,000
Olive oil	120	17,000	227	13,680
Sardines	...	...	66	4,000
Other articles	572	3,370	895	3,940
Total	16,639	64,866	16,335	40,146

RETURN of Principal Articles of Export from Lorient during the
Years 1893-92.

Article.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value
	Tons.	£	Tons.	£
Wine and spirits	..	2,756	..	200
Pit-props	7,628	3,680	8,552	6,276
Preserved vegetables	..	..	150	3,424
Rye	..	..	1,923	10,898
Other articles	148	370	271	2,566
Total	..	6,806	..	25,274

TABLE showing the Total Value of all Articles Exported from and
Imported at Lorient during the Years 1893-92.

Country.	Exports.		Imports	
	1893.	1892.	1893.	1892.
	£	£	£	£
England	39,680	20,000	13,336	40,900
Sweden and Norway	150	500	30,420	53,060
Spain and Portugal	1,240	1,600	..	6,000
Other countries	4,040	24,400	14,900	15,000
Total	45,110	46,520	58,656	114,000

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AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF ROUEN AND DISTRICT.

REFERENCE TO PREVIOUS REPORTS, Annual Series No. 839 and
Miscellaneous Series No. 241.

*Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.*

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FRANCE.

ROUEN.

Consul O'Neill to the Earl of Kimberley.

My Lord,

Rouen, April 16, 1894.

I HAVE the honour to enclose Annual Report upon the Trade and Commerce of Rouen for the past year, with Tables of Imports and Exports completed to January 31 last, that is for two whole years after the date of the enforcement of the late French Customs Tariff.

I have, &c.

(Signed) H. E. O'NEILL.

Report on the Trade and Commerce of Rouen for the Year 1893.

ABSTRACT of Contents.

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Effects of
late customs
tariff.

The main interest of a report upon the trade and commerce of a French port still centres upon the question—"What has been the general effect of the last French customs tariff?" Two years have now elapsed since it was put into force—"Are its effects in any direction prominent and clearly visible?"

Too much
not to be
expected.

It will be pretty generally acknowledged, I think, that on neither one side nor the other are its effects so marked, so apparent as to enable Free Traders or Protectionists to seize hold of and display them as conclusive proof of the truth of this or that commercial policy. But have not both parties expected too much of the evidence the new tariff was to yield? Has it not on the part of Free Traders been too often spoken of as a "new departure"; as a reversal of a previous policy, and as such, has it not been expected to yield evidence directly indicating that reversal and to produce a condition of affairs so opposed to that which before existed that it could at once be pointed out as an unmistakable result of the "new protective policy" generally regarded as initiated at that date?

Is it not often forgotten that the French customs tariff of February, 1892, was but the last of a long succession of steps in the same direction of which the fiscal and shipping Laws of 1871, 1872, 1877, 1881, and 1885 were the most notable examples?

Is it right to regard the customs tariff of 1892 as anything more than an elevation, important it is true, of the fiscal barrier, that has been building up from the first years of this century, to the presence and protecting influence of which French commerce has adapted itself and on which French producing industries have learnt to lean? Was not the more liberal policy of the Second Empire only a diversion too short in duration and too partial in kind—it lasted but 16 or 18 years—to create such an alteration in the industrial condition of the country that any great and visible changes can be expected from the reactionary measures of 1892 and of the previous 20 years?

Great changes
cannot be
expected
upon
industry.
Upon
commerce.

The comparatively liberal commercial policy of the Second Empire was not thorough enough nor long enough in operation to kill native industries brought into being in previous periods of protection, and we cannot therefore expect to see many new industries established or a great extension of the old under such a reversion to protection as was effected by the customs tariff of 1892.

Again, if under the Empire there was a certain marked development of the foreign commerce of France and a corresponding creation of collateral industries, importing houses, maritime agencies, and such as live upon foreign and international trade, these are not easily broken up, though I may say here it is in this direction that evidence of the crippling effect upon trade of the new tariff is clearest and most easily obtainable.

Upon cost of
living.

If evidence upon such points as the above has been less

marked than was expected, still less can we hope to see very pronounced effects where the consequences of protection are indirect and of slow growth, as upon the cost of living. In England, thanks to the freest import of all "food stuffs," we are supplied with every necessary of life, from the best and cheapest markets of the globe, and the real wages of labour have been correspondingly raised. No such opportunities can be said to have been given to the consumer in France, whose food coming from abroad is always taxed the moment its price drops below the cost of its production in France, and the effects therefore of such a measure as the last customs tariff are thus rendered more remote and obscure. Upon wages.

Certainly the evidence has been perplexing to many, and the balance cannot be said to have strongly inclined yet on either one side or the other. Free Traders have been constrained to admit that the exports of France, though distinctly falling now, held up for some time to a singularly high level, and this whilst imports tumbled to such low figures as have not been seen for certainly more than 10 years past.* Confusing evidence.

May not that apparent anomaly, however, have a simple explanation. Is it not possible that the unusually high level that French exports maintained for 12 months after the establishment of the new tariff, was but the result of a necessary return in kind to the forced and excessive flow of imports during the 12 months that preceded that tariff. That necessary payment made, the exports would, following the fall in imports, show a tendency to decline, and this is what we see they are now doing. Exports and imports falling.

It is, however, the duty rather of those who have had to deal with the general statistics of the country to remark upon and attempt to resolve these questions. We who write from outlying ports and single centres of industry can only put forward local statistics, and we must be careful not to omit to point out how, again, these are influenced by local or special conditions, which may affect their value if they are to be looked upon as proofs or manifestations of the effects of such a measure as the late customs tariff. A statement of facts alone is insufficient; it is indeed often misleading unless their causes are also shown. Local statistics.

I have, however, prepared all the tables attached to this report, with the special view of showing the effect upon the trade of Rouen of that tariff.

* The value of the total of all imports into France average 171,473,000*l.* for the 8 years immediately preceding the last customs tariff. But in the first year after, viz., in 1892, they declined to 167,522,360*l.*, and last year they fell to 157,468,800*l.*, or 14,000,000*l.* below the average before the tariff.

On the other hand, the total value of all exports from France for eight years before the tariff from 1884 to 1891 inclusive, averaged, 135,449,200*l.*; and in 1892 (though showing a fall on 1891) they were still 138,429,000*l.*, or nearly 3,000,000*l.* above the average. In 1893, however, they had fallen to 128,384,760*l.*, or 10,000,000*l.* in one year, and more than 7,000,000*l.* below the average of the 8 years preceding the last tariff.

Import and export tables. To do this properly it was necessary to draw the line of division between the old commercial régime and the new at February 1, 1892, and to neglect the ordinary division of the calendar year. Through the kindness of the customs authorities I am able to give the statistics of chief imports and exports for the two years succeeding the new tariff, i.e., from February 1, 1892, to January 31, 1893, and from February 1, 1893, to January 31 this year. Face to face with them I show the imports and exports of the two years preceding that tariff, so that comparison may at once be made between them.

To make clearer still the effect of the tariff upon the trade of this port I divide the imports into the three classes into which they naturally fall when one is making an examination of them of this nature—

Foreign manufactures. 1. "Articles of foreign manufacture."—To these one turns naturally when asking oneself the question, "What have been the effects of the tariff upon British and foreign trade?"

Raw materials. 2. "Raw materials and other articles required for the making up of French protected industries."—Is the tariff sufficiently protective to develop French manufactures formerly handicapped by foreign competition? If so, evidence of this may reasonably be looked for in an increased import of raw materials.

Articles of food. 3. "Articles of food and general consumption."—Under this head I class articles of food, and using the word consumption more in its economic than in its general sense, certain other commodities not to be placed under the first two heads.

Number on new French tariff. I also prefix to these tables a column showing the number of the articles in the new French tariff, so that by reference to the tariff published by the Trade and Tariff Committee of the Board of Trade (No. VII, 1892) a comparison may at once be made between the old duties and the new.

How contradictory the evidence may appear to be on the surface, and how necessary it is to examine each article separately, and to weigh the special conditions affecting its trade, a few words upon the principal imports of Rouen will show.

The chief imports of Rouen. Nine-tenths of our imports, if estimated by weight and bulk, consist of such commodities as coal, timber, petroleum, wine, and wheat. Now, each of these imports has been affected by influences quite independent of the tariff, and in some cases to a larger extent by them than by the tariff.

Petroleum. I take first the case of petroleum, the import of which has kept at a fairly steady level for four years past from 45,000 to 50,000 tons. The trade in this product shows no sign of contraction. Just the reverse, it gives strong promise of immediate and considerable expansion. In the year ended January 31 last the imports rose to 73,361 tons.

Large increase in its import.

But the new protective tariff does not touch it. No fresh duty has been laid upon it. They remained as before, 18 fr. and 25 fr. per 100 kilos., or the double cwt., upon the crude and refined oil respectively. And fifteen months after the establishment of the tariff, a step was taken with this product in the direction of free trade. A special commercial convention with Russia reduced the above duties to 9 fr. and 12 fr., and the imports of the greatest oil producing country—the United States of America—benefited equally with Russia by the convention.

New tariff does not touch it.

Duties on it have been lightened.

Again, if we look further back we shall see that contrary to the experience of most commodities imported into France, the fiscal burdens on this product have been in regular course of diminution. In 1871 raw petroleum was taxed 20 fr. the double cwt. on entry and refined 32 fr., and those heavy burdens remained upon it for some years. But each change made since has removed a restriction and lightened the burden. It is therefore to a steady advance in the direction of free trade in respect to this product that we owe its expansion.

They have steadily diminished in the past 20 years.

Other causes have, of course, also conduced to this development. First amongst them is perhaps the diminished cost of the production of crude oil, which fell in the United States, between 1871 and 1891, from 10 c. to 2 c. per gallon, and to this again must be added the enormous decline in freights in the same period. The uses of this product have also greatly extended, and the demand for it has correspondingly increased. To all these forces operating towards an expansion of its trade, Government action has lent an important and, in France, an unusual aid by a reduction of customs charges. And this has been done in the face of the efforts of French refiners and colza growers.

Decreased cost of production.

The efforts of French refiners have, however, been chiefly devoted to keeping the difference as large as possible between the taxes on the raw and refined oils. It is the colza growers and the schist oil producers of France who would have the duty on the crude increased. Their complaints are pretty loud and persistent, and it is now proposed to aid the schist oil producers by a money bounty on their production. Crude oil importers might have had some reason to fear the growing strength in the French Chamber of the agricultural interests, which would naturally support the claims of the Normandy colza growers; but fortunately for the importers and refiners the tax on crude oil has now been settled by a convention, which political reasons render more stable than are most customs duties, in a country where all interests are demanding more protection.

The efforts of French refiners in the Chamber.

Colza growers of Normandy. Schist oil producers.

A good prospect of steady duty.

These and other causes have decided three more oil companies, chief amongst which is the great Standard Oil Company of America, to establish a branch at Rouen. The

American Standard Oil Company.

imports of oil to Rouen have hitherto been carried on by the two great French houses of Deutch et fils and Fenaille et Despeaux, whose refineries are established upon the banks of the petroleum basin where the crude oil imported is pumped straight into the reservoirs from the ocean-going tank vessels moored almost alongside them. The Standard Oil Company has lately bought and walled in 24½ acres of land at the western extremity of that basin, and for the past six months their new establishment has been rapidly progressing and is now approaching completion. Two large reservoirs for crude oil, each capable of containing 5,000,000 litres (1,100,100 gallons); a dozen or more smaller reservoirs for the stowage of the refined of different qualities; a spacious engine-house, offices, dwellings for the employés, and workshops for the packing and despatch of the refined, all will be finished and in full working order by the middle of the year.

Prospects of
competing
with existing
refineries.

It is in the perfection of their refining processes, as well as in the greater economy of production realized through the possession of enormous capital and such an organization as the world has never, perhaps, before seen, that the great Standard Oil Company hopes to successfully compete with the existing refineries of France. Holding everything in their own hands, from the oil wells to the field of consumption; possessors of their own ships for the transport of their oil across the Atlantic; controlling the railway rates for its carriage to the American seaboard; and proprietors of their own refineries in Europe, it should be in their power to render an immense service to French consumers.

At their Rouen branch they will be able to store the contents of three large tank vessels, and they calculate upon refining or converting into other petroleum products not less than 150,000 barrels of crude oil per annum.

Petroleum
basin.

The petroleum basin is being lengthened and deepened to facilitate the expansion of the petroleum trade of this port, and when dealing with the improvements to the harbour I will describe the changes there being made.

Wheat.

I take next the case of wheat, for its imports show more visibly and immediately than perhaps those of any other protected natural product of France the influence of the duties levied upon it. An even partial suspension of the duty—a reduction of 5 fr. to 3 fr. per 100 kilos. will bring in a few weeks a fleet of sailing ships into every French port laden with wheat from all parts of the globe. That was the effect of the partial suspension—of the lifting off, from October, 1891, to May, 1892, of 2 fr. of 5 fr. leviable under the tariff. Speculators seized the opportunity to restock with a view to profit by the rise in price that succeeds the re-imposition of the full duty, or that which would precede a future suspension of it, and it has been lately asserted on good authority that 2,000,000 hectolitres (687,802 quarters) of the stock then laid in still remains unsold, and the

present low price of wheat (17 fr. to 20 fr. the 100 kilos., or 34s. to 40s. per quarter) is partly attributed to the effects of that forced supply. A more recent proof is, however, before us of the upward bound imports in this product will take when there is even a rumour of an increase in the duty upon it. For many months past agriculturists throughout the country have asserted that the price of wheat had fallen below the cost of its production in France, and agricultural syndicates and associations have been steadily coalescing to demand an increase in the duty. Whilst its price has varied from 18 fr. to 21 fr. the 100 kilos. (36s. to 42s. the quarter) in the Rouen market, its cost of production throughout this department is variously estimated at between 20 fr. 80 c. and 24 fr., or between 41s. 8d. and 48s. the quarter. The composition of the new Legislative Chamber after the last election and the appointment of a commission to consider this question, 29 of whose members out of 33 were pronounced Protectionists, showed plainly the way the wind was blowing, and vessels laden with foreign wheat commenced at once to pour their cargoes into all ports of France. So strong is what may be called the struggle of a country for cheap bread.

The cost of
producing
wheat in
Normandy.

Our table of local imports shows also in an unmistakable manner the sensitiveness with which the trade in wheat responds to the slightest alleviation of the burden upon it. The eight months during which the duty was partly suspended saw about 350,000 tons of wheat landed upon our quays or transhipped to Paris, and not one-tenth of that amount came here during the twelve months that succeeded the reimposition of the full duty.

Returns of
local imports.

Not that other powerful, if indirect, influences are not acting also upon this trade. They are numerous and varied enough to perplex those who are striving to effectively protect agricultural interests in France by high import duties. Upon no imported product, perhaps, does the influence of international exchange act more powerfully than upon wheat, for most of the wheat growing countries of the world are afflicted with depreciated currencies. Russia, India, the United States, and the Argentine Republic have all their premiums upon gold. It is asserted in a private Bill now before the Chamber, that the French importer of wheat from the Argentine Republic is able to pay the whole of the duty of 5 fr. per double cwt. by the premium offered him in that country for his gold bill. The argument in the preamble to the Bill runs thus:—"Gold at Buenos Ayres has been at a premium of 125 per cent. A bill for 1,000 fr. on France is therefore worth 2,250 fr. in the currency of that country. That currency though depreciated in relation to gold, still maintains its former exchangeable value in the Argentine wheat growing districts where the cost of producing 100 kilos. of wheat is from 6 fr. to 8 fr., and it is an undeniable fact that that amount of wheat has been purchasable in the Buenos Ayres market for 9 fr." It is

Other
influences on
the wheat
trade.

International
exchange.

impossible to think that prices had not changed to some extent, even in the more remote districts of the Argentine, with so depreciated a currency. But the currency has been of late years a steadily depreciating one, and it is to the fact that prices do not rise correspondingly or keep pace with the depreciation that the gain on exchange and stimulus to exports is due. Gold is now in the Argentine at a premium of 257 per cent., and it may well be that the price of wheat in Argentine paper has not risen more than 122 per cent., whilst that of gold has risen 257 per cent., which will leave a balance of gain on a transaction in wheat of 125 per cent. as argued above. A French importer's bill for 1,000 fr. will therefore purchase him 25,000 kilos. or 25 tons of wheat. Or, reducing these figures, he is able to purchase for 4 fr. what is valued at 9 fr. in the markets of the wheat producing countries of the world, and to effect a saving in the cost of 100 kilos. of 5 fr., which exactly represents the duty on that quantity.

India, again, is cited in the same Bill as another instance of the advantage offered to the French importer of foreign wheat by a depreciated currency in the country of its production, and we know that the culture of wheat in the wheat growing districts of the Punjaub has been steadily fostered for many years past by the depreciating value of the rupee when measured in gold. There the premium on gold being less than in the Argentine the corresponding advantage is of course smaller, but it is sufficient to enable the French importer to pay 3 fr. 50 c. of the 5 fr. leviable as duty. And now we are told that the repeal of the Silver Bill and consequent depreciation of silver in the United States is the main cause to which is to be attributed the sale of wheat on the seaboard of America at 9 fr. per 100 kilos.

These forces, quite impossible for the protectionist legislator to foresee, are acting constantly upon the trade in foreign wheat. My chief object in referring to them here is to point out a singular, but, it may be said, a logical outcome of protection. Proposals are now actually made, and they are formulated in that same Bill, to legislate against the advantage given to the French wheat importer by the premium on his gold offered by wheat growing countries with depreciated currencies. That is to say, the French people are to be called upon to tax themselves for the great advantage they possess in the enhanced exchangeable value of their gold in those countries and its additional purchasing power there. It is proposed that a Frenchman buying wheat (and presumably other products would follow) in a country whose credit and currency is equal to that of France, shall pay a certain fixed duty upon his imports; but that, if his purchase be made in a country with a credit inferior to that of France and with a depreciated currency, he shall pay upon his imports the fixed duty plus a surtax that shall be in proportion to the appreciation of his gold in that country. An advantage due, therefore, directly to the

A singular
outcome of
protection.

Surtax on
imports.

excellent financial condition of his native country it is deliberately proposed to take from him.

There is, of course, what may be called an exporting side to this question, and French exporters to those countries of French manufactures suffer from the depreciation of the currency in which they are paid. But the removal of the advantage gained by the French importer of foreign produce from the premium upon his gold, will not better the condition of the exporter of French manufactures who also deals with that country. Is not the gain to French importers a national compensation for the loss of the French exporters and manufacturers? And is it not a singular, if logical outcome of protection that such proposals should be made?

Exporters of French manufactures lose what importers gain.

A table of duties on wheat is called for that shall be at once "savant et compliqué," to use the words of a Protectionist organ. Englishmen will regard the taxes lately voted on this product as sufficiently complicated. They are the following:—

Table of import duties lately voted.

IMPORT Duties lately Voted upon Foreign Wheat, &c.

Number in Customs Tariff.	Description.	Per 100 Kilos. or Double Cwt.
		Fr. c.
68	Wheat, spelt and meslin—	
	In the grain whole	7 0
	Ground and bakers' stuffs containing more than 10 per cent. of flour	11 0
	Flour bolted to or with a rate of yield of 70 per cent. and above	11 0
	Flour bolted to or with a rate of yield of from 70 per cent. to 60 per cent. ..	13 50
	Flour bolted to or with a rate of yield of 60 per cent. and less	16 0
75	Ships biscuit and bread	7 0
76	Groats, cullings and hulled or cleaned grain	16 0
76A	Decorticated or hulled millet-seed	6 0
77	Semolina and Italian paste, macaroni, &c. ..	16 0

I take next the case of wine, the imports of which, as might be expected, directly exhibit the influence of the heavy increase in the Protective duties. Our local figures under this head are, however, somewhat capricious. They do, indeed, show a very heavy fall in the past three years—from 65,000,000 gallons in 1891 to 46,000,000 gallons in 1892, and then to 26,000,000 gallons in 1893. But this is a decline which is out of proportion to that shown by the figures for the whole of France, which are 12,500,000, 9,500,000, and 6,500,000 hectolitres for the same three years. And Rouen has reason rather to expect that the decline in the local wine trade would be less, and not more than that revealed by the general statistics of that country. The general decrease of the imports of wine into France is directly due to the heavier duties imposed on foreign wines, and our local

Return of imports.

Local imports compared with general.

trade is not dependent wholly upon foreign wines. Much of the wine that passes through Rouen to Paris and other great centres, for which Rouen is the most convenient terminal seaport, is French wine grown in the vineyards of the extreme south of France and shipped for Paris at Cette, Port Vendres, and Marseilles. Nearly 8,000,000 gallons or one-third of the total import at Rouen last year was the produce of French vineyards. These wines form a considerable element in the freight of a French line of steamships employed in the coasting trade of France. A great part of the wine trade of Rouen is therefore independent of the customs tariff, for, needless to say, French wines are not touched by the import duties. How, then, are we to explain the fact that the local imports show a greater depression here than elsewhere? Some cause weighing specially upon the Rouen wine trade is evidently at work to depress it.

It is not always easy to trace the causes of these sudden changes in trade, and still less to give to each cause its proper weight, but I believe I may correctly say that the chief disturbing influence apart from that of the heavier duties has been the combined action of the great railways extending from Paris to the south of France—the Paris-Lyon-Méditerranée, the Southern, and the Paris-Orleans Companies—to lower the freight on all wines from the southern provinces, and to establish a common rate per ton from every wine district of the south to Paris. It is proposed to fix a common rate of 28 fr. per ton for every consignment of not less than 8 tons if made by any single person. This from all stations in the wine-growing districts irrespective of distance.* Though the lower railway tariff is not yet in operation, not having received the approval of the Minister of Commerce, there is no doubt it will be shortly established, and already its effects are seen in the diminished imports by sea, the wine growers and great Paris houses preferring to wait and to let the stocks accumulate rather than to send them to a southern port for shipment by sea *viâ* Rouen to Paris.

The railway carriage will then compete with that by sea.

At first sight it would seem that this competition of railway freights with those by sea could not be seriously harmful to the latter, for the present freight for wine from Cette to Paris by coasting steamer and lighter is but 24 fr., and from Cette to Rouen but 18 fr. per ton. To that amount must be added, however, the additional charge upon the wine, if sent by sea, of its transport from the district of its production to the southern port of embarkment, together with the greater risks of the sea voyage and the repeated changes: (1) From rail to ship at the southern port; and (2) from ship to lighter at Rouen; and lastly, of the greater length of time entailed by the sea voyage.

The new rates proposed by the railway companies have not

* The tariff proposed is a "zone tariff," but as the wine districts in the extreme south, which now send their wines by sea to Paris, would be in the same zone, the rates from all their stations would be equal.

failed to rouse a vigorous protest from the navigation companies, the associated syndicates of wholesale dealers in wines and spirituous liquors, and other interested bodies; but the great Paris interests, together with those of the vine-growers, for whose distress it is also regarded as a measure of relief, are too powerful, and all others have succumbed before them. Protests.

One argument brought forward by the protesting bodies, strikes upon the ear of a foreigner attentive to the varied effects of the extension of State-aid to all suffering industries, for it affords another proof, if proof be needed, that however indirect may be the relief given it can only be at the expense of the whole nation. Protesting bodies.

The associated syndicates take up the case of one great railway company, and point out that it transports not less than 150,000 tons of wine from Cette to Paris annually at the rate of 37 fr. 50 c. per ton. This rate, as I said before, it is now proposed to reduce to 24 fr. How, they ask, can railway companies, whose receipts are exceeded by their working expenses, and who have annually to appeal to the State for aid to pay the interest guaranteed upon their shares—how can these same companies afford to grant so great a reduction of freight upon this one commodity alone as 9 fr. 50 c. per ton? “Is it not,” they say, “only another way of granting to the vine growers of the south, and the wine merchants and consumers of Paris, a money bounty which we agriculturists and industrials of the north shall be called upon to help to pay?” An argument that seems not to be without force when one turns to the Budget items, and finds that 3,000,000*l.* sterling (76,214,000 fr.) was claimed last year by the railway companies of France to make up their deficits, and to pay the interest guaranteed to them by the State. It is only right to point out that the railway competition protested against by local bodies at Rouen, does not threaten to be really damaging to the seaborne wine traffic from Spanish ports, when this is carried out by steamers direct. Consignments made by steamers direct from such eastern Spanish ports as Alicante and Valencia, are carried to Rouen at from 17½ fr. to 20 fr. per ton (1,000 litres), and from the Northern ports of Spain at from 13 fr. to 15 fr., at which rates no real fear can be felt of the railway competition above alluded to. Proposals made by the railway companies.

To sum up these few remarks on the wine trade, it is impossible not to notice, in connection with the general wine trade of France, two great facts:—(1) There has been a very great diminution in the imports of foreign wines in both 1892 and 1893, which amounts in the two years to close on 50 per cent., whether estimated by quantity or value; (2) there has been a steady decline equally remarkable through proportionately less in the exports of French wines. Summing up.

We are dealing here with one of the chief industries of France, the fabrication of light wines for export. It is an

(1) A great diminution in the import of foreign wines.

(2) A steady decline in export of French wines.

A great French industry has apparently suffered a blow from protection through the lessening of foreign imports. Decline in wine exports shown.

industry in which no country has approached her, and if we were led to hope anything by the advocates of a protective policy it was that this great exporting industry would receive an impulse, and we were told we might expect to see here an illustration of the Protectionist's maxim, that "whilst buying less from the foreigner it would be possible to sell him more." And yet, though we are dealing with a manufacture in which the superiority of France over all other countries is acknowledged, we meet with nothing but a steady decline. From a general export of 44,052,338 gallons (casked and bottled) valued at 9,828,480*l.* sterling in 1891, the figures fall to 39,896,428 gallons valued at 8,542,920*l.* in 1892, and again to 33,566,962 gallons valued at 7,515,320*l.* in 1893.

It is not, as is sometimes asserted, that the depreciated and depreciating currencies of some of the countries which buy largely of French wines has made the placing of this commodity in them more difficult and tended to cripple this exporting industry. If we turn to the statistics of the trade in this article with the Argentine Republic, the country whose currency has suffered most, we find a less diminution in the exports of French wines to it than to many other countries, with which the exchange has had no effects prejudicial to the French export trade. More French wines were imported by the Argentine Republic in 1893 than in 1891, and this fact alone seems to point to the conclusion that the largely increased imports of wheat from that country have tended to check the fall of French wines to it.

Phylloxera.

On all sides, however, and to every country there is a decrease in the export of French wines, that to Switzerland showing, naturally and in consequence of the recent tariff war, the most disastrous fall. And in connection with this it should be borne in mind that no circumstances adverse to the vine culture have contributed to this depression. The general statistics of the country prove that, in spite of the ravages of the phylloxera which destroyed 1,000,000 hectares of vineyards in France out of a total of 2,500,000 hectares under cultivation before the appearance of that plague, and which diminished the production of wine in France from an average of 55,000,000 hectolitres to 25,000,000,—in spite of this great decrease in the wine production, the export wine trade of France maintained its high level and showed even a steady upward tendency. From 1884 to 1890, and whilst France was still suffering cruelly from the ravages of the phylloxera, the value of the wines exported by her increased steadily from 237,000,000 fr. to 268,000,000 fr., and it is only since the imposition of the late customs tariff that we remark a serious heavy fall to 187,000,000 fr. or of 25 per cent. upon the average of the 8 previous years. This fall has occurred although the effects of the heavier duties have been alleviated by the premium on gold offered to the French importer of Spanish wines. With that premium he has been enabled to partly reimburse himself for the extra duty imposed and to

Exports of French wines.

continue to import wines, which, on account of their greater strength, form, as "vins de coupages," a necessary element in the fabrication of most French exported wines. The full effects of the duty have not in consequence been yet felt. It is impossible not to conclude these remarks with one question. To what are we to attribute this great fall in the exports of French wines, a fall so general that the export to every country bears mark of it, if it be not due to the one cause, equally general, that has struck a heavy blow at the imports of all countries—increased protective duties? It is a result so opposed to the predictions of Protectionists that it is worthy of a closer examination than I am able to give to it.

The next product to be examined is that of timber and ^{Timber.} woods of all kinds, which from their bulky character and low value will always form one of the main imports of an inland port like that of Rouen. Our tables show some interesting figures here. The fluctuations in the imports of the last 3 years are curiously sharp, and the causes need some examination. From 132,000 tons in the year preceding the late customs tariff they fall to 75,000 tons in 1892, but again run up to 135,000 tons last year. In wood pulp we observe the same variations. An import of 60,000 tons in 1891 is succeeded by a fall to 24,000 tons in 1892, and again by a sharp rise to 59,000 tons last year. These changes fairly correspond also with the fluctuations in the general imports of this commodity throughout France. How are they to be explained?

The great fall in the import of foreign woods in 1892 is natural enough. The customs tariff of February of that year made wide changes in the conditions of the timber trade. Under the conventional tariff before existing nearly all woods entered France free. But even the minimum tariff now imposes duties varying from 6 fr. 50 c. to 17 fr. 50 c. the ton upon the woods which are discharged at Rouen. The roughest unbarked log of timber from the forests of Russia or Sweden and Norway pays the first of those duties, and planking of 35 millims. (1.38 inch) in thickness, prepared in the steam saw-mills set up now in so many Scandinavian fiords, pays no less than 17 fr. 50 c. upon every ton in weight. The greater portion of the planking brought to Rouen is from 1 to 3 inches in thickness, and upon this is levied a duty of 12 fr. 50 c. per ton. The infliction of such duties sufficiently explains the fall of nearly 50 per cent. in the imports of 1892.

Such burdens seem, indeed, to the simple mind of a Free ^{Why} Trader or to the uninitiated almost prohibitive, and one is led to ^{imposed.} search for the causes of their imposition. Perhaps the simplest

explanation lies in the fact that in France the State itself is the greatest of landed proprietors and the chief of all French timber dealers. 2,500,000 acres of the forests of France belong to the State and 5,000,000 more are the property of the communes and municipalities of the country. These form ^{The State is in France the greatest landed proprietor and largest timber dealer.} together an immense public estate, the larger part of which is

Its forest
domain.

carefully tended at great cost and treated chiefly with a view to its commercial value, *i.e.*, to the production of woods useful to commerce, the sale of which forms a regular and valuable source of revenue. So far the maintenance of this public estate has been largely exceeded by the revenue gathered from it. Though the Administration of Woods and Forests has of course other objects in view beyond a mere money return, such as the public health in the planting out of marshy districts, the preservation of mountain slopes from landslips and other like aims, yet the annual receipts have hitherto more than doubled the expenditure. The yearly cost of administration (in which is comprised the maintaining of a Corps of Forest Guards of 8,000 men) has averaged in the past years 20 years, 500,000*l.* sterling, and the revenue from the 2,500,000 acres alone, which form strictly speaking the National Estate, independently of the communal, has so far doubled and sometimes trebled that sum. This revenue has been gathered in from sales of woods alone of which there is an average yearly production of 4,000,000 cubic metres.

Receipts and
expenditure.

Foreign
woods in
competition.

Like wheat, wine, coal, and many other natural products of the country, it has however suffered of late years from foreign competition, and a revenue which reached 41,000,000 fr. (1,640,000*l.*) in 1865, has fallen gradually to 26,000,000 (1,040,000*l.*) in 1892. The State, therefore, has itself had a direct interest in the reduction of foreign competition, and has desired to see, for the benefits of its own purse, the import of foreign woods decrease. The laying on of additional duties on wheat and wine may benefit wheat and vine growers, but if they have the effect desired, they will harmfully affect the National revenue by a diminution in the customs receipts. Not so the duties on foreign woods, for the State is, as I said before, the largest of French timber growers and wood merchants.

Now, how is it that in spite of these protective duties foreign woods have recommenced to pour into the country, and why is it that last year their imports attained such figures as have only once before been reached in the past 8 years?

A cause as impossible for the Protective legislator to foresee, as the Argentine revolution or the repeal of the Silver Bill in the United States, both which stimulated the imports of foreign wheat, has arisen to upset the estimates made in the case of the trade in foreign woods. That cause I shall not be wrong in describing as the distressed condition of the shipping industry of Great Britain, and the keen competition for freights between all over-sea carriers. It is only this competition which has led to such a reduction in the charges for the transport of timber over-sea that the importers of wood into France have been able to disregard the import duties, and have been induced to renew to the full their former stocks of foreign woods. At Rouen we import timber chiefly from the Swedish and Russian ports of the Gulf of Bothnia. It comes to us in the form of planking from 1 to 3 inches in thickness, and most of it pays a

British
shipping
industry.

duty 1 fr. 25 c. (1s.) per double cwt. Three years ago the freight paid for this wood from a Baltic port to Rouen varied from 65 fr. to 75 fr. per standard, sometimes even reaching 80 fr. Since that time it has never ceased to decline, a sharp fall occurring last year, and at this moment ships are accepting freights of 40 fr. and even 35 fr. for the same measure. British ships are entering more and more into this trade, and I am assured by my Swedish colleague, who is himself connected with the timber trade, that in the past year cases have not unfrequently occurred of contracts in this service which were refused by Swedish ships because of the low rates of freight being taken up by British vessels. Many will no doubt be surprised at this, for the current opinion is that a British ship cannot be run at so low a rate as a Swedish or Norwegian. It may, however, be explained from the fact, brought out from recent sales of British shipping, that vessels are being parted with in the United Kingdom at ridiculously low prices. The original capital invested in these vessels by their present owners is so small that even if the working expenses are a little higher than those of a foreigner, they are better able to bear a low rate of profits. It is probable also that the fall in freights during the last six months of 1893 was one of the indirect consequences of the great Midland coal strike. A temporary check was given by that strike to the export of coals from the United Kingdom, and many ships usually employed in the coal trade were obliged to look for freights elsewhere, thereby adding to the facilities for the transport of timber.

British ships
and the wood
trade.

The great
coal strike of
1893 an
indirect
consequence ;

In any case it is to these low freights, as I have said, that the great renewal of activity in the foreign wood trade of Rouen is chiefly due. To fully comprehend its effects it must be remembered that transport forms a chief element in the cost of production of such wood products as are imported, mostly for building purposes, into this port. The cost of a standard of white pine is now about 205 fr. at Rouen. Its conveyance over sea from a Swedish or Russian port, if we take the mean freight of the past three years, may be placed at from 60 fr. to 65 fr. The carriage of the timber of which it was made from the forest where it was felled to the port of embarkation, though a more variable quantity, may be averaged at from 60 fr. to 70 fr. more. Transport, therefore, enters into the cost of its production to the extent of from 60 per cent. to 70 per cent.

The question of transport is therefore a vital one for the timber trade. It may be said to rule it, for whilst the other elements of production are, comparatively speaking, fixed or only slightly variable, this one changes with every improvement in navigation and every increased facility of conveyance through a country, such as is obtained by a good system of canals. How far the French Government recognizes the importance of this element in the production of timber from its forests, one has only to ride or drive through a French State forest to see. We in the Seine-Inférieure have exceptional

The State
forests of the
Seine-
Inférieure.
Excellence of
the roads.

opportunities of observing this. Fifteen per cent. of the area of this department is covered with forest, the greater part of which is administered by the State. Wide woods surround us on every side at Rouen, and most of the hilly ground on both banks of the Seine, stretching away down to the estuary, is clothed with oak, beech, elm, and pine. The soil is too poor to be of any agricultural value, and from pre-historic times to this day, the narrow belt bordering the Seine has remained essentially a forest country. The woods in this department alone form an immense timbered estate, administered by the Government, of 231,000 acres.

Nothing surprises a foreigner who wanders through these forests more than the excellence of the roads that traverse them in every direction. The winding deep-rutted cart track of an English wood and its open grassy glades are banished hence. No considerations of beauty enter into any of the 226 clauses of the Forest Code that govern the administration of a French State Forest—a Code, I may say here, which forms as much a part of the Statute Law of the country as its Penal or Commercial Codes. Nature is rarely left alone in France to work out unregulated its own laws and to take its own shapes and forms, and no considerations of beauty are allowed to interfere with the primary ones of utility and commercial value which inspire the Forest Code.

Main lines of what we in England would term admirable carriage roads lead in the straightest of lines from the heart of these forests to all points in their vicinity where a market for timber, or a station for transport is to be found. And branching out from these larger roads are numerous minor ones, equally straight and well kept, cut with the sole view of facilitating the transport of the timber felled at their sides. Bearing in mind the importance of this question of transport in the production of timber, one is able to understand the meaning of French forest roads which otherwise are inexplicable, and seem only an extravagance and waste.

It is well indeed for the country, that by these means and by its admirable system of canals the French Government does its utmost to cheapen the products of its woods, as France has to depend entirely upon the home production for the wood its people burn for fuel. No wood for this purpose is imported, for it cannot stand the duty leviable upon it.

Coal.

It has so far
escaped an
increase of
duty.

The annual
coal supply
of Rouen.

I now come to the last of the five great imports of Rouen—that is, coal. This is one of the few foreign products amongst the 654 articles enumerated in the French customs tariff that has escaped an increased duty, and its examination seems greatly simplified thereby. No artificial checks being thrown up by fresh duties, its imports are steadier, the gradations are easier, and are due to natural causes easy to seek.

Rouen appears to require from 500,000 tons to 600,000 tons of coal annually—in part for its own needs and in part for those of the industrial towns of the country, that draw their supplies

through this port. That is the amount of coal I find that has been brought yearly to Rouen from all sources in the past ten years. The supply is part British, part French, and a small but inappreciable fraction comes to us from Belgium. By far the greater part is British. From 1883 to 1892 inclusive, I find Rouen has imported over 4,000,000 tons of British, and a little over 1,000,000 tons of French. The exact figures are 4,132,941 and 1,083,142 tons of British and French coal respectively. Needless to say, all the British comes to us by sea (except a small fraction that reaches us through Dieppe), and all the French by land, both by rail and canal. The following table showing the proportion that comes by these three routes is I think sufficiently interesting for insertion here.

COALS Imported at Rouen.

Year.	British.	French.	
		By Rail.	By Canal.
	Tons.	Tons.	Tons.
1883	449,902	47,789	5,694
1884	437,509	33,856	11,003
1885	399,683	47,621	25,790
1886	345,579	42,184	25,410
1887	342,644	45,045	63,452
1888	341,679	136,737	25,400
1889	286,964	168,785	42,015
1890	544,716	108,860	25,299
1891	531,597	93,326	10,861
1892	452,644	108,681	15,371
Total	4,132,917	832,857	250,285

It will be seen the proportion between the British and French coal is not a fixed quantity. As might be expected, with an increased home production, French coal enters more and more into consumption. French coalpits yielded 18,000,000 tons in 1883, but 26,000,000 tons in 1893, and we see from the above table that whereas in 1883 and 1884 the proportion of British coal to French imported by Rouen was as 9 to 1, in 1891 and 1892 this relation had changed to 4 to 1. In 1888 and 1889, indeed, the proportion of French coal to British is far larger, reaching in that period more than one-half; but this is explained by the low price of French coal in those two years, when it fell to 10 fr. 31 c., and 10 fr. 42 c. per ton, a figure which has not since been maintained.

Some may be led from an inspection of the above table to infer that railways appear to hold their own, and even to gain on canals in spite of the superior canal system possessed by France. But a glance at a map of the canals of France will reassure the believer in the utility of interior waterways for

the transport of heavy and cumbersome merchandise. Coal, when it comes to Rouen from the Departments du Nord and Pas de Calais has to make a wide détour by the Canal de l'Oise, which taps the Seine just below Paris. It passes, in fact, first S.E., then S.W., and again turns N.W. to descend the Seine to Rouen. It traverses three sides of a rectangle, whereas the communication by rail is direct, and passes only along the fourth side of the same rectangle, and, what is a matter of moment, lighters descending to Rouen have to consider the ascent on their backward journey against current for nearly 200 miles of the Seine and of the Oise, so far as the latter is a "rivière canalisée," and to estimate also the probabilities of a return cargo from Rouen or from Paris. Very different would the rival conditions of rail and canal be if, as in many cases, the communication by both was equally direct.

Imports of British coal. Turning now to the local imports of British coal in the past year we find they maintain about the same level as in 1892, though one-fifth less than the mean of the three previous years.

Effects of the great strike. The first question to ask is, "What effect had the great Midland strike upon our imports?" A strike that paralyzed a great part of the production of the country, and turned aside the usual outlets of other areas of production to such an extent that Great Britain exported 1,500,000 tons of coal less last year than usual, could not fail, one would suppose, to seriously disturb our local imports. It is singular to notice, in reply, that in the last half of 1893, or during the great strike, the coal imports here went on much as usual, and that from August 1, 1893, to January 31, 1894, 225,000 tons of coal were imported, or 40,000 tons more than in the first six months of the year. I am told that two causes contributed to this. It was just during the months of the strike that our trade was most active, and our harbour fullest of ships. It was the briskest season of the year for the importation of wine. The timber trade, owing to causes already pointed out, had thrown off its previous sluggishness. And the total failure of the oat crop in France had created a keen demand for foreign oats, which were poured into the country during the last six months of the year. 88 ships laden with oats discharged 120,000 tons upon our quays in those months. Bunker coals were, therefore, during that period, in active demand, and high as the price of coal had risen during the strike, ships had to be supplied. The second cause which came to the aid of the coal importer, just as it has aided the importer of timber, was a fall in coal freights of about 20 per cent. The average freight for some time past of a ton of coal from Cardiff to Rouen may be given as 6s. 6d. This fell to 5s. 3d., and even to 5s.

Unusual imports of oats and hay.

General conclusions.

The general conclusion to be drawn from an enquiry into the coal trade is that, though the proximity of Rouen to the British coal fields and lowering freights have enabled British coal to compete in many local markets with French, and

though the imports have kept up in a remarkably steady manner, yet there can be little doubt the British coal trade is a declining one, and it is as certain that the French is slowly supplanting it. I am told the Paris demand for British coal has very greatly diminished (though I cannot get figures on this head), and I know a British coal-dealer who, trying to place British coal in Argenteuil, on the Seine, just below Paris, was met by the reply—"Impossible. I can get French coal now from the Department du Nord put alongside my manufactory at 17 fr. the ton, whereas you can only offer me British at 27 fr."

French coal cheaper than British.

If we send British coal into the heart of the country, and I know we do send it even as far as Chartres, it is to those French towns and districts with which we are in communication by rail, but which are not themselves connected with the remainder of the country by its interior waterways. There is a large district S.W. of us, of which Chartres, Alençon and Dreux may be said to be central points, untraversed as yet by canals, and here British coal is still to some extent sent. Nevertheless the supply, there can be little doubt, is one destined all round to decline.

Where no communication by canals British coal still sent.

It is only natural that French railway companies should assist to their utmost the distribution of French coal. The railway rates for the carriage to Rouen from the mines of the Department du Nord have lately been reduced to 6 fr. per ton in the case of all consignments of 100 tons or more. This will, no doubt, give an impulse to the employment of French coal in this neighbourhood, and it will tend also to further diminish the quantities that come to us by canal.

French railways and French coal.

Before passing from this slight review of the trade in timber and coal I cannot help referring again to the great part played in the production of these two essentials to a manufacturing country by such a canal system as that of France. It is impossible for an Englishman to see it without regret at the abandonment of a systematic canal construction in his own country. With foreign manufactures on every side competing, and too often successfully with British, it seems to one who observes this from abroad that we must be seriously handicapped by so great a want. Every element in production is being pared down to the lowest possible limits, and wages, if we may judge from recent events, are to be no longer squeezable. Prices we are now told must start "from the bed-rock of a living wage." Is the constant perfection of water transport in foreign manufacturing countries a matter of so little concern to us? More especially in the production of coal, timber, and raw materials, in whose cost manual labour or wages form so large an element.*

Canals and the transport of coal, timber, raw materials, and agricultural produce.

* Canals in France transported, in 1892, 25,957,686 tons of merchandise, and railways, in 1891 (the latest published statistics), 96,553,763 tons. The exact proportion of one to the other is 26·8 per cent. The tonnage carried by canals shows a slight gain on the previous year; that by rail, it is anticipated, will show a slight loss in 1892 over 1891.

I have now reviewed all the most important imports of Rouen, and there is little more that need be said upon the side of our external or foreign trade. That a great blow has fallen upon the port, and that, in common with all the ports of France, it has suffered and is suffering from the effects of the late customs tariff was a point that, indeed, hardly required proof. If a slight renewal of activity on our quays during the past six months has helped to alleviate that blow and to hide some of the ill effects of the tariff upon the port interests, this is due to two causes which cannot be too clearly brought into view. First, special conditions wholly independent of the tariff have acted upon the most important of our imports and have helped to neutralize the effects upon them of the heavier duties. These influences I have pointed out in speaking of petroleum, wheat, wine, timber, and coal successively. The second cause is one which the best wisher of the port of Rouen will not desire to see repeated. It was in fact a national misfortune. A total failure in the oats and hay crops of last year that caused great distress and loss to the agriculturists of the country, obliged France to stock herself from abroad with these products. Hence the arrival of about 100 vessels charged with cargoes that in normal years are little seen upon our quays.

General
shipping
returns.

It may be well, however, to dwell for a moment also upon the returns of shipping. In spite of the temporary impetus just mentioned the evidence they yield is unmistakable. Instead of a steady upward rise, unbroken for 20 years before 1892, when the number of entries of vessels of all classes increased from 3,750 in 1872 to 5,986 in 1891, and the tonnage showed a still more striking increase from 551,855 tons to 2,435,850 tons (owing to the deepening of the Seine and the larger size of the ships that entered it), we are met with a fall in 1892 to 5,229 entries with an aggregate of only 1,932,028 tons. This fall of 20 per cent. in tonnage is I think very similar to that shown by the statistics sent from other great ports of France.

British
shipping.

The aggregate of vessels of all nationalities that entered last year is not yet published,* but I am able to give the return of British ships and it will be seen it tells the same tale. The mean of the two years after the tariff shows a fall of 29 per cent. upon the mean of the two years immediately preceding it.

* Since writing the above, the return for 1893 has been issued. The total is 5,224 ships of 2,081,882 tons.

Date.	Number of Vessels.	Tons.
February 1, 1890, to January 31, 1891	1,107	527,803
February 1, 1891, to January 31, 1892	1,178	589,105
February 1, 1892, to January 31, 1893	742	346,916
February 1, 1893, to January 31, 1894	877	437,043

It is time for me to turn now to the side of home or French production, and to see what evidence there is of the industrial expansion on which Protectionists have set their hopes. Let us at once frankly admit that an examination of the imports of raw materials does give results betokening greater activity on many sides of manufacturing industry. It could hardly be otherwise. The French markets for manufactured goods being partly cleared of foreign competitors, it is but natural that French manufacturers should prepare at once to extend their operations. Consequently we fully anticipate an increase in the imports of raw materials necessary to industry.

French
production
and industrial
expansion.

This increase is especially noticeable on the side of the metal trades. The imports of metal ores of all kinds, of cast and wrought iron, and of steel, copper, lead, brass, and nickel, are in every case larger in 1893 than the mean of the eight years preceding the last tariff. Though we do not in many cases see a corresponding increase in the exports, and though the aggregate of exports shows a large decline, yet it may be reasonably assumed that there is room for an extension of operations in the French market alone to fill gaps occasioned by the withdrawal of foreign competitors. Until the livelier demands created by that withdrawal are supplied and until the internal competition to supply them becomes sufficiently keen to lower prices—as we see it has done in the case of other long protected industries—French manufacturers will benefit by the higher import duties lately imposed.

Metal trades.

Foreign
competition.

When I turn, however, to the industries special to the region of which Rouen is the centre—to cotton-spinning and weaving—I do not see so much evidence of increased activity. Not only I cannot hear of any new manufactories established in our neighbourhood, but I notice a distinct fall in the import of raw cotton during 1893. This may, perhaps, be in a measure accounted for by the large imports of the year before, still it is remarkable that the exports of cotton tissues have fallen also in 1892 and 1893 to a level much below the mean value of the exports of the eight previous years, when French manufacturers were less completely armed against their foreign competitors.

No expansion.

In those years cotton tissues to the value of 4,263,880*l.* were
(1725) B 4 Cotton
exports and
imports.

annually exported; in 1892 and 1893 the mean had fallen to 3,899,440*l*. There was a slightly increased export of cotton yarns last year, but even here the values do not reach the mean of the three years preceding the tariff. The mean value of yarns exported in 1892 and 1893 was 116,040*l*., whereas that of the three previous years was 119,640*l*.

Cotton yarns
and tissues.

If we examine our local imports we shall find they tend to confirm these conclusions. The cotton tissues imported last year show an increase upon 1892, and even pass above the level of the two years preceding the tariff. The import of cotton yarns even shows an upward tendency, and this in the face of duties of which the ad valorem equivalents vary from 13 per cent. to 25 per cent.

Machinery.

An addition of about 30 per cent. to our usual imports of machinery will be noticed for 1892, and this would indicate a slight industrial extension, but it has not been maintained, as the figures for last year are something lower than the average of the eight years preceding the tariff.

The customs
tariff.

So far as I can discover the customs tariff of 1892 has not had the effect of creating any marked industrial expansion in this region. Perhaps it will come. The Norman is often—by his fellow countrymen charged with excessive caution and of being slow to move. We have had lately in this city an illustration of this which it may not be out of place to relate here as it is in connection with the effects of protection on national industry.

French
shipping
industry.

There is no industry that has been more carefully nursed than that of French shipping. In 1881, French shipbuilders were encouraged by the grant of a bounty of 60 fr. on every ton constructed by them, if the vessel were of iron or steel, and of 20 fr. per ton, if it was of wood. They were incited to purchase all their machinery of French makers by a further bounty of 12 fr. for every 100 kilos. or double cwt. of French machinery placed on board their ships. Navigation companies and shipowners were, in their turn, spurred to purchase none but French vessels, by the grant of 1fr. 50 c. per registered ton for every 1,000 miles run by vessels bought by them from French yards. To discourage the purchase of foreign ships, the navigation bounty was reduced by one-half in the case of every vessel bought out of France.

Bounties on
construction
and naviga-
tion.

Last year a great step forward was taken to make this protection more effective, and to compel French shipowners to buy their vessels in France. The navigation bounty on all vessels henceforward purchased out of France was entirely suppressed;* the construction bounties were doubled in the case of wooden vessels—being now 40 fr. per ton,—and increased from 60 fr. to 65 fr. a ton, for iron or steel ships. And the reward for purchasing French machinery instead of foreign was increased from 12 fr. to 15 fr. for every double cwt. placed on board a French ship.

* This did not prevent France purchasing 36,000 tons of shipping in Great Britain last year.

With such bounties there seemed little doubt that French shipowners would perforce have to purchase their vessels in France. As France possesses a mercantile marine of 2,403 vessels of 804,336 tons burden (I include only those over 50 tons), and as a considerable proportion of French vessels have hitherto been bought abroad, here was clearly a great opening for the construction of a ship-building yard in France.

The advantages of Rouen for such a yard had often been pointed out. Whilst the investments of a shareholder in a ship-building yard at Havre or Marseilles could—would probably—be reduced to ashes in 24 hours by the shells of a hostile fleet, no such misfortune could possibly overtake them here. A dockyard at Rouen is quite secure from foreign attack, for no hostile fleet will ever ascend the Seine. Moreover the tranquil, natural basin afforded by the river was favourable, and land very suitably placed was to be had at little more than its agricultural value. Every encouragement that nature and a kindly Protective Government could give, favoured the construction of a dockyard at Rouen, and promised its financial success.

Special advantages of Rouen for a dockyard.

A dozen or more of the richest and most influential men in the place, accordingly determined to start the enterprise. It was decided to begin on a modest scale and to construct nothing at first but sailing ships. The profits over and above those gained by a British ship-builder would, it was computed, work out approximately thus. Take the case of an iron or steel vessel of 2,000 tons. The cost of such a ship in England would be about 14,000*l*. The construction bounty alone on a vessel of this tonnage built in France would be 130,000 fr. or 5,200*l*. If we are to credit the computation of a French shipowner, M. C. Fabre, the gain of the shipbuilders will be much greater, for, he tells us, the shipbuilder will demand of the shipowner a certain proportion of the navigation bounty to be gained by the ship built by him. However this may be, it would be impossible to find a combination of circumstances more favourable to such a scheme.

Enterprise started by influential men.

Profits of shipbuilding.

Incredible though it may seem, for many months it was found impossible to make up the small amount of capital required to start the enterprise. In this city of 175,000 inhabitants (I include the suburban communes, really a part of the town), the richest in North-west France, there could not be got together 200 men willing to subscribe among them the 40,000*l*. which was all that was required. It has been done at last, and the enterprise is now well started, with, I believe, good prospects of success. It has already an order for a steel sailing ship of 3,000 tons.

Difficult to raise the necessary capital.

But are we to look upon this case as only typical of Norman caution—of a narrow conservatism that refuses to enter upon new paths? Does a constant indulgence in State-aid and Protection lead a Frenchman to look for Protection even in his investments—to turn to French Rentes, State-aided Railways, &c., and to shrink from enterprises, the success of which is not assured by the State? Or was it the result of a well-calculated

Protection.

fear, that even such bounties will not balance the burdens imposed on industry by the prohibition, through heavy import duties, to purchase materials for construction, tools, &c., in the best and cheapest market? Various are the opinions offered, and it is impossible yet to say which is the true. Many of us are watching with great interest the progress of this, the only industrial enterprise I am able to report from Rouen, as directly due to the influence of the late protective tariff.*

Improve-
ments to
Rouen
Harbour and
Lower Seine.

I pass now from the side of the external or foreign trade of Rouen to that of its harbour works, and the changes that are being made in the conditions under which vessels may enter the estuary and the Lower Seine. On the side of our foreign trade much that I have had to say has been of stagnation and depression; upon the side I now enter, there is nothing to report but incessant and active progress. The number of vessels visiting the port may be decreasing; the length of the quays at which they can discharge is steadily on the increase: the first step has been taken to supersede gas upon them by electric lighting, so that work may go on through the night: another of the great railway lines of France—the Orleans—will shortly be connected with the southern of our quays, and the rail-cars and other facilities placed at the disposal of vessels discharging there will be many times multiplied: the petroleum basin will be more than doubled in length and area: more and more water is being obtained by incessant dredging upon the shallower points passed over by vessels ascending the Seine; and the lighting of the estuary with gas boat-buoys has proved, by the experience of the past 12 months, that the river may be entered at night with ease and safety.

Briefly summed up these are the improvements lately made, or now in progress. They have received nowhere the slightest check in consequence of the diminished activity of the port. This will be surprising to many Englishmen. If Liverpool or Southampton had suddenly received a blow to their foreign commerce that sent down their entries of shipping some 20 or 25 per cent., the harbour works would certainly and instantly feel the contre-coup, their execution would be delayed, and shares in their harbour loans would probably not stand at a premium.

Unbroken
progress.

The absence of any such effects upon the progress of the harbour works of a French port like Rouen is due to the centralized system of Government in France. The plans and estimates of all these works, designed in fairer times for the

* Since writing the above I have been told of the establishment, in 1892, of one small weaving mill at Petit-Quevilly, a suburban commune. But the complaints of hard times in the cotton industry are general, more especially upon the side of the spinners. I hear, however, that more advantage is being taken in the N.E. of France of the late increase in protective duties. In the Vosges I learn about 3,000 additional looms have been laid down in the past 2 years. Some new cotton-spinning mills have also been erected there. The Société Cotonnière de l'Est at Vaucoucy, a mill of 32,000 spindles, and the Société Cotonnière d'Heilleme (Nord), of 100,000 spindles, both enterprises supported largely by foreign capital. And nearer here, at Amiens, is another new weaving mill, that of Esnauld-peltier with 500 looms.

port, have been drawn up by State engineers; the Harbour Board or Chamber of Commerce, the Town or Municipality, the County or Department, and the Central Government, all contribute fixed proportions towards the cost of their execution; the expenditure has received the approval of the Chamber of Deputies and of the Senate, and finally they are being executed by a corps of Government engineers. It is difficult to upset any works in which so many distinct bodies take part, and for the cost of which so many budgets have been arranged to provide. And so, despite the diminished shipping, the improvements go on merrily, and the anomaly between a decreasing shipping and an increasing harbour expenditure appears to trouble nobody.

I will describe these improvements in the order in which I summed them up. No one entering from the seaward will fail to remark the first of them upon his left, as he enters the port. In my last report upon the harbour of Rouen,* I told of the provision being made for the future extension of our quays by the expropriation of a strip of land 2,500 metres in length and 80 metres in width upon the right bank. This has now been carried out. An excellent road, the Boulevard Croisset, planted with an avenue of plane trees, has been completed along the whole length expropriated, and the prolongation of the old Quai Boisguilbert by 270 yards to the westward—a work to be finished this year—will be the first step of the gradual extension I then spoke of. The rails of the Compagnie du Nord, now serving the northern quays throughout their whole length, will be carried on upon it, and it will be provided with hydraulic cranes for the discharge of cargoes from the ship's holds, straight into the rail-cars.

I think there is little doubt this quay will eventually be lighted by electricity though there is just now a dispute as to which body shall bear the cost. A recent ministerial decision, based upon a law of April 5, 1884, has laid down that the expense of lighting the quays should fall entirely upon the town or municipality. A vessel moored to a quay of the harbour is likened to a house bordering a street, and as everything entering the town from her is subject to the octroi or town dues, it is argued that the quay to which she is moored should be lighted wholly and solely by the town. The Municipal Council of Rouen do not entirely accept that view, so far as regards electric lighting, and the question is under discussion yet.

Though less noticeable from a ship's deck on entering, a similar work is progressing on the left bank of the river where the lengthening of the southern quay keeps pace with the northern. Upon that side the Quai Bethancourt will be prolonged 189 metres this year, and the rails of the Compagnie de l'Ouest carried forward upon it will enable ships discharging from the wood basin on the one side as well as those clearing from the new quay on the other, to place their cargoes on the rails of the same company. For our southern quays have now

* Miscellaneous Series, No. 241.

reached the strip of land (formerly the Island Rolet) which divides the wood basin from the river, and this strip will now be laid out as a quay and entirely utilized for the service of ships.

It is upon the Quai Bethancourt and around the wood basin that our first essay in electric lighting—the second of the improvements I mentioned—is to be made. This work is a natural complement to the lighting of the estuary. Vessels now enter the Seine and ascend with ease at night. By doing so they gain a tide and avoid a delay of 12 hours in the Havre Roads. The electric lighting of the quays on which all coal is discharged will afford colliers the chance of gaining another 12 hours, for work may then go on upon them rapidly and uninterruptedly through the night. It is proposed to light that part of the Quai Bethancourt and also both sides of the wood basin with 27 electric lights, of a power of 50 carrels each. The lamps will be set upon pillars 25 feet high, and they are to be not less than 27 yards from the edge of the quay. This number, it is calculated, will sufficiently illuminate about 60 acres of quay and basin in that quarter.

The whole of the first cost of setting up the plant is to be borne by the State. The cost of the production of the electric power for the maintenance of these lights is estimated at 14,000 fr. (560*l.*) per annum. Under recent decisions this cost would, as I before said, fall to the municipality. But that body regards its lighting duties fulfilled by the cheaper radiation of gas. It says therefore to the Chamber of Commerce—"If you desire a more brilliant and costly light for the benefit of the shipping, you must share with us the greater expense." And the decision ultimately arrived at is that the town shall give 10,000 fr. yearly, and the Chamber of Commerce, whilst hedging itself in with clauses stipulating that its concurrence shall not establish a precedent, consents to pay annually the remaining 4,000 fr. It will reimburse itself by a small lighting tax, which is to be levied on all vessels clearing at night. The work of the electric lighting will shortly be begun, and, it is expected, it will be finished before the end of this year.

Small lighting
tax will be
levied.

The connection
of the
Western and
Orleans lines
at Rouen.

The third of the improvements mentioned by me is, from some points of view, the most important of all. It is financially the largest. Its cost will be 3,837,000 fr. (153,480*l.*). But it means much more than a simple amelioration of the railway service upon one of our quays, as I will try shortly to show.

Rouen is not only, from its geographical position, an inland port for ocean steamers, situated 70 miles in the heart of the country, it is also a point of contact of three of the six great railways of France, and therefore a natural centre of distribution by rail. The Western Company serving the north and north-west, the Northern Company serving the north and north-east, and the Orleans Company serving the centre and west of France, all touch each other at this point.

Now, the link which it has been decided this year to make bridges a gap, narrow it is true, but all-important in railway

connection between the Western and the Orleans lines, and throws, so to speak, these two great companies into one. Administratively this has been done for some time past, for the Great Western line has been for some years working, as concessionaire, the branch which connects us at Rouen with the Orleans line, or with the centre and west of France.

A simple illustration will show clearly the important position held by Rouen with regard to the railways of the country. The railways systems of France have been well compared to a great spider's web, of which the heart is Paris. All the six great companies centre there, and their main lines branch out thence to the several extremities of France which they serve.

Now these great main lines are connected by lines of lesser importance, which run between them like the concentric circles of the spider's web. But look at the map, and it will be seen that the Seine cuts into this great web, and destroys the continuity of these concentric circles for no less than 125 kiloms. from the border of the web. Rouen is the point farthest from Paris, and furthest out upon the Seine, where the railways can cross the river. There is no short cut across the Seine below Rouen and though the powerful interests of Havre are striving to gain one by means of a bridge or tunnel across the river at Quilleboeuf, so far none has been made, and the railway connection of Havre with the West of France is through Rouen. The importance of facilitating by every possible means the connection between the great lines touching each other here will therefore at once be seen.

The link that is to weld the Western line and the Orleans practically into one will be made by means of a viaduct between the termini of these two companies in this town south of the river. An obstinate battle has been fought for 10 years past over the question as to whether the connection should be by a level-crossing, by a viaduct, or by a tunnel. The State, on which the whole cost of the connection falls, has desired the viaduct as the least costly; the Town Council has, in the interests of the inhabitants of the quarter to be traversed, opposed it in favour of a tunnel. The port and manufacturing interests of the neighbourhood have lost unquestionably by the delay due to the contest, and it is to their increasing strength and to the pressure brought to bear by them that we owe its settlement. Now it is finished it is needless to say more about it. The viaduct will be shortly commenced; it will be upon stone and brick pillars, with iron girders, and it will cross over the streets south of the Place St. Sever. The cost will be 3,175,000 fr. (127,000*l.*).

The connection of these two great lines will not however be the only advantage to be gained by the end of this dispute. Shipping and importers of foreign goods will also benefit by it. Up to now ships discharging into rail-cars upon our southern quays have been cleared by a line, which, by a level crossing, passed through the busy thoroughfare of St. Sever. It

Benefits.

was a crossing that could only be effected at the slowest speed, and great delays as well as an insufficiency of cars at the disposal of the ships were a frequent occurrence. When the work of which I speak is completed, commerce will be entirely rid of this inconvenience. The level-crossing by Place St. Sever will disappear and the service of the quay will be carried on from a large goods station to be erected immediately behind the new Gare d'Orleans, and therefore from a point that is almost in the centre of the southern quay. From this goods station trains will be made up and despatched westward to any point upon the Western system or by the Orleans to the south and centre of France.

New goods station.

A third advantage to be gained by Rouen from the connection is the erection of a handsome terminal station for the Rouen-Orleans line in the Place St. Sever. The inconvenience of the present small and only temporary one has been long felt. The new one for which the plans have long been made and approved will be a fitting and commodious one, and 662,000 fr. (26,480*l.*) will be expended on it.

A new terminus.

Enlargement of petroleum basin.

The next of the harbour works to be spoken of is the enlargement of the petroleum basin, rendered necessary by the development of the petroleum trade of the port. The present basin is rather over 700 metres in length. Nine-hundred metres are now being added to it, so that before long the great refineries and petroleum dépôts established here will have a basin rather over a mile in length arranged especially for their ships and devoted solely to their trade. Nature has made the enlargement an easy work for the Rouen engineers. More of the islands that beautify the surface of the Seine are to be seized upon to effect it. Less than 10 years ago four long islands divided the river into two channels just below the town. Covered with a perpetual green and planted thickly over with fruit trees they formed, especially at spring time when in a mass of bloom, as fair objects as could possibly greet the eye, and they were popular resorts of pleasure parties from the town. The manufacturing spirit as it advances expanding our suburbs has seized upon them one by one and converted them to its unbeautiful uses. The upper or Ile Rollet has long disappeared. Joined at its upper extremity to the left bank it now divides the wood basin from the port; a rail runs over it its banks are stone faced, and its surface, converted into a quay, is blocked with hillocks of timber and coal.

The extension described.

The second or Ile Elie has disappeared also, having been joined to the mainland by a dam thrown across from its centre to the left bank. The channel between the first two of these islands being left open, formed the entrance to the wood basin on the east, and petroleum basin on the west. The third of these islands, the Ile Poutrel, will now follow the fate of the others through the extension of the petroleum basin. A junction of its eastern extremity with the Ile Elie will throw these two islands into one; at its western end it will be joined

by a broad dam to the left bank. The dam which now forms the end of the present petroleum basin will be cut through, and thus a long basin 1,600 metres in length will be created which is to form the new petroleum basin. The basin now in use is provided with quays for five ships well separated the one from the other. The extension gives room for six more quays, three of which will be constructed at once and the remainder as the necessities of the trade call for them. Few ports will then be able to offer a greater assurance to ships laden with petroleum against accidents by fire than Rouen with this basin over 1 mile in length and completely isolated from the remainder of the port. I should add that the entrance to it is to be made easier by a cutting off of the northern point, that is of the south extremity of the former Ile Rollet, upon which also a fixed red light is to be placed.

The dimensions of the new basin.

When I come to speak of the improvement in the Lower Seine made through dredging and dyking, I am met by a difficulty. The work though unceasing is so slow and gradual—from month to month almost imperceptible—that except to the mind of a man engaged in engineering interior navigable waterways the usual description is only confusing and meaningless. I shall carry no meaning to the ordinary mind if I say that the bank of Croisset has been reduced by dredging, in the past 5 years, from an elevation of 105.10 to 106.04 in the technical scale by which the French engineers measure the progression of the work done by them. A more simple and intelligible, if rougher, description is wanted than this. We shall get it if we start from the basis of the zero line of the Marine Charts, and bear in mind that when a shoal in the Seine has been dredged down to that level, it will have upon it about 6.20 (20 feet 2 inches) of water at average high tides. A few years ago the banks of Croisset, Grand Couronne, Moulineaux, Boardouville and Meules were all from 2 to 3 feet above this level. The first three of these are now shorn down by dredging to 0.20 below the zero line. That is to say, a fairway giving from 3 to 4 feet more water, throughout a width of 100 metres, has been cut through them. The work of increasing this depth to a whole metre below the zero line is now in progress upon the bank of grand Couronne.

Dredging and dyking of Lower Seine.

Upon the larger bank of Bardouville which lies across the river 20 miles below Rouen, and is 2 miles in length, a greater depth of water has been attained, a pass 50 metres in width and one metre below the zero line having been dredged through it. A heavy additional piece of dredging on this bank was decided on last year. It has been determined to double the width of the pass. That is to say, from 1 to 1½ metres are to be taken off the bank throughout its whole length for an additional width of 50 metres.

Heavy dredging to be done on Passe Bardouville.

The increase in depths gained may seem to some small. The importance of the work will be made clearer to many when I say that the dredging and dyking of the Passe de

The cost of dredging the Bardouville bank.

Bardouville alone has already cost 54,308*l.* (1,357,689 fr.), and the work now to be undertaken upon it will, I am told, cost another 25,000*l.*

The heaviest
dredging
work is on
the Banc des
Flaques.

Perhaps the most important of the dredging works to be commenced this year is the removal of the Banc des Flaques, a bank which lies across the bed of the river about six miles from the entrance. The point marking the 322nd kilom. from Paris stands about its centre, and it is nearly a mile and a-half in length. So far it has been left alone, partly because it has not presented a serious obstacle to navigation, ordinary high water giving a depth of 6·20 metres upon it, and partly because, unlike the other banks which are of soft alluvium, it is composed of a stiffish conglomerate. Until the late trials had proved to the contrary it was thought to be too stiff to be attacked by dredgers, and the greater cost feared has caused work upon it to be deferred till now. As however the shallower points in the river have been successively deepened it was felt that the time had come for facing this last and worst obstacle in the river bed. Careful observations have shown that lying across the channel at that point it acts as a submarine barrier to the free in-flow and out-flow of the tides. They have shown that whereas the fall of the river during the ebb is only 0·06 of a metre in the 1,000 metres above this bank, immediately below it the fall becomes 0·09 in the 1,000. And with the flood the fall of the waters from off it increases also in the same degree, but of course in the opposite direction. It is clear that it materially hinders the in-flow of the tides and lessens the volume of water that enters the river. As it is to the free, automatic working of the tides that we look for the preservation of the depths obtained by dredging, the necessity of its removal became more and more evident. The work will be shortly commenced. The plans which have been approved are framed to provide for an increased depth of one metre throughout a channel whose least width will be 150 metres. To obtain this it will be necessary to remove about 450,000 cubic metres of the bank. The expense is estimated at 2 fr. the cubic metre or 900,000 fr., which with 80,000 fr. more for unforeseen expenses will raise the cost of this work alone to nearly 40,000*l.* Three new dredges and another tug boat will soon be at the disposal of the engineers, chiefly for the above work and that to be undertaken upon the Passe de Bardouville. Two are being constructed by a French firm at Lyons, and the third has been transferred to Rouen from the Government service at Dieppe. One of the new ones, which has cost 3,200*l.*, is now completed and will be in the river in a few weeks.

Cost.

Lighting of
the estuary.

It only remains for me to say a few words regarding the lighting of the entrance to Rouen Harbour—that is, of the estuary—by gas boat-buoys. There is nothing new to report on this. Within the past five years the system of marking the estuary channel has been twice changed, and nothing perhaps has shown more the determination of the Rouen authorities to

render the entrance of their harbour easy and safe. In 1889, metal buoys securely moored were substituted for the poles crowned with brushwood which had served for many years before, and though those buoys were a very great improvement upon the old method, in three years they were again changed to boats gas-lit to enable vessels to enter the river by night. It was, however, an experiment. So much had been said of the dangers of the estuary that doubts were expressed if vessels would ever venture to pass through its banks by a channel 12 miles in length at night. It is for that reason that I have collected evidence upon this point and asked for the opinions, verbal and written, of the masters of British vessels who have made most use of the channel at night, and who have now entered the river at all seasons of the year and in nearly all weathers. There are, I find, no two opinions upon the matter. Except when a fog is hanging over the estuary the channel may be entered with perfect safety at night, and with almost as much ease as in broad daylight. The chief of the pilotage service writes—"The navigation by night is so easy under present conditions that some of the pilots prefer to pass by night rather than by day, and all enter without hesitation at night when weather permits."

The evidence of the masters of British vessels obtained by me is equally favourable. "It is as easy as going up a lighted street," one master has said to me. "I have found it on every occasion very good, . . . it is quite safe at night-time if the weather is fairly clear, and the system is as good as any that could have been adopted," writes the master of the "Aberdeenshire." "I think the present system of lighting the entrance to the River Seine to be the best of any of the rivers we navigate, and in clear weather it is quite safe," writes the master of the "Pioneer." "I have found the entrance to the river most effectively lighted, and superior to any I have been up," is the opinion of the master of the s.s. "Highlands." "I regard the plan adopted for lighting the Seine to be very good indeed and in a clear though dark night it is absolutely safe for any vessel to enter or leave drawing from 12 to 16 feet," is the view of the master of the "Olive." "With regard to the lighting of the entrance channel to the Seine, with gas-buoys, I think it is the most superior for safe navigation at night for vessels from 12 to 15 feet of water that I have ever seen in any part of the world," is the expression of the master of s.s. "Ann."

I could give others in the same strain, but these are, I think, sufficient to prove that the system of lighting by gas-buoys, now fairly tried for a year, has been a complete success. 210 vessels drawing from 12 to 20 feet of water entered the Seine at night last year. In all the letters on the subject, received by me, I read only one unfavourable note, and that was from the master of a large tank steamer drawing 22 feet of water who attempted to enter in early morning after the heaviest of our

last winter's gales. The fearful sea raised had displaced and capsized several of the boat buoys nearest the entrance. The pilot had not foreseen the possibility of this, and, mistaking the channel, the vessel touched upon the end of the Ratier Bank. I think it right to mention this as it may be found advisable to give greater stability to those outer ones within reach of the heaviest seas. The same system of lighting is, I am told, about to be followed in Southampton Waters, and it may be worth while to keep this danger in view.

Table I.—PRINCIPAL Imports to Rouen for two years preceding the New Customs Tariff compared with those for the two succeeding Years.

Number in New French Tariff.	Description of Articles.	1890.	1891.	Mean of Two Previous Years.	February 1, 1892, to January 31, 1893.	February 1, 1893, to January 31, 1894.
ARTICLES OF FOREIGN MANUFACTURE.						
510-536	Machines and machinery	1,776.7	2,742.0	2,259.3	3,116.7	2,208.4
368-371	Yarns, cotton.. ..	1,141.2	1,354.0	1,262.6	678.9	713.6
438-454	Tissues, wool.. ..	1,192.6	1,207.4	1,199.9	353.0	167.6
404-436	„ „ cotton	948.7	998.2	970.9	339.8	960.4
372-376	Yarns, wool	663.4	773.6	718.5	461.9	254.5
363-366	Yarns, jute, flax, and hemp.. ..	75.3	70.9	73.1	0.4	3.5
181-187	Building materials	3,552.5	3,251.0	3,401.8	1,047.5	1,051.5
RAW MATERIAL AND CERTAIN OTHER ARTICLES REQUIRED FOR MAKING UP OF FRENCH PROTECTED INDUSTRIES.						
190	Coal	526,650.4	510,366.6	513,508.0	419,801.0	411,914.4
128-140	Timber of all kinds (rough and sawn)	84,242.5	132,256.0	108,249.2	75,786.2	134,871.0
168	Wood-pulp	22,632.8	59,686.2	41,159.5	23,881.3	58,911.1
179	Kaolin.. ..	11,679.1	19,940.5	15,809.8	8,593.8	9,908.6
220	Lead	7,891.1	13,936.9	10,913.9	8,235.3	11,030.8
88	Oleaginous seeds and fruits.. ..	2,497.4	4,761.5	3,258.9	2,960.0	2,985.6
206-207	Bar-iron	2,683.2	3,714.9	3,199.0	6,076.3	4,870.1
205	Cast-iron (including pig and foundry iron)	699.2	503.0	601.1	1,861.5	5,207.7
192	Coal tar	1,815.9	5,334.2	3,575.0	9,194.9	73.7
141	Raw cotton	1,127.9	1,735.6	1,431.8	498.2	628.1

PRINCIPAL Imports to Rouen for two years preceding the New Customs Tariff compared with those for the two succeeding Years—continued.

Number in New French Tariff.	Description of Articles.	RAW MATERIALS, &c.—continued.				
		1890.	1891.	Mean of Two Previous Years.	February 1, 1892, to January 31 1893.	February 1, 1893, to January 31, 1894.
140	Dye-woods	1,190.4	130.5	675.5	560.2	18.7
23	Wool in the mass (including alpacas, lambs, Vienna wool, &c.)	555.0	518.0	536.5	349.1	337.6
110	Olive oil and vegetable oils	410.2	434.4	427.3	262.1	179.4
264	Chlorate of barytes	671.5	287.8	479.6	245.6	339.0
238	Arsenious acid	435.0	504.0	469.5	240.4	230.5
247	Carbonates of potash and soda	137.6	17.2	77.4	1,238.2	822.1
223	Tin	84.3	48.4	66.4	76.8	151.8
23	Wool waste	33.0	21.6	27.0	14.8	240.3
171	Wine (common red).. ..	33,182,978.8	64,635,705.2	48,900,342.0	45,662,388.2	8,127,775.5
ARTICLES OF FOOD AND GENERAL CONSUMPTION.						
72	Maize	125,586.2	..	125,568.2	39,083.2	97,112.3
68	Wheat (in the grain)	70,303.8	225,443.5	148,198.7	131,618.8	69,624.6
69	Oats	40,344.5	25,940.9	33,142.7	4.2	123,013.4
197-198	Raw petroleum and mineral oils	50,551.9	36,452.8	43,502.4	55,427.7	73,361.0
85	Raisins, dried.. ..	5,068.3	6,758.3	6,013.3	2,069.2	3,624.5
	Spirits, brandies, and liqueurs	51,234.4	58,883.3	55,058.9	68,265.6	119,980.0
112	Purified oils and essences	632.7	130.7	381.8	3,281.4	1,894.4
89	Sowing seeds	425.9	575.6	500.8	6,977.6	11,211.0
96	Coffee	573.7	602.0	587.9	645.9	374.0

FRANCE

Table II.—PRINCIPAL Exports from Rouen for two years preceding the New Customs Tariff compared with those for the two succeeding Years.

Description of Articles.		1890.	1891.	Mean of Two Previous Years.	February 1, 1892, to January 31, 1893.	February 1, 1893, to January 31, 1894.
FRENCH MANUFACTURED PRODUCTS.						
Wine in casks	..	28,745.9	88,072.2	58,409.0	27,411.1	104,334.2
Wine in bottles	..	62,564.7	85,135.6	73,850.1	52,896.8	46,888.7
Plaster of Paris	..	21,435.2	16,057.2	18,746.2	20,418.4	7,881.4
Raw French sugar	..	22,040.0	11,873.5	16,956.7	5,823.9	31,745.2
Refined sugar..	..	16,234.1	10,300.6	13,267.4	7,111.9	10,192.8
Gallic acid	..	8,402.0	2,281.9	5,342.0	3,104.4	931.6
Rags ..	..	3,396.1	1,520.7	2,458.4	3,295.7	24,136.0
Glass bottles ..	..	425.0	614.7	518.9	342.5	111.4
Cotton tissues..	..	220.0	987.1	603.6	512.1	480.2
Hydrochloric acid	..	510.9	273.4	392.2	270.0	252.0
Machinery ..	..	220.5	100.9	160.7	265.9	1,864.3
Acetate of lead	..	249.5	125.8	187.7	32.8	83.0
Sulphate of iron	..	72.9	0.7	36.8	4,110.0	881.8
Paper ..	..	36.0	42.7	39.4	75.8	121.2
Toys ..	..	65.4	53.2	59.8	145.7	56.4
Colza oil	..	85.7	26.5	53.0	231.3	141.6

PRINCIPAL Exports from Rouen for two years preceding the New Customs Tariff compared with those for the two succeeding Years—continued.

Description of Articles.		1890.	1891.	Mean of Two Previous Years.	February 1, 1892, to January 31, 1893.	February 1, 1893, to January 31, 1894.
FRENCH ANIMAL, VEGETABLE, AND OTHER NATURAL PRODUCTS.						
Sand for glass ..	Tons ..	18,442.1	19,448.9	18,945.4	18,203.2	15,975.6
Ochre ..	" ..	3,352.0	3,500.3	3,426.2	1,822.5	1,609.6
Barley ..	" ..	1,367.8	4,972.0	3,169.9	10,115.1	105.6
Sowing seeds ..	" ..	1,626.1	855.0	1,240.6	1,288.6	653.5
Chalk ..	" ..	646.4	661.1	668.9	732.5	499.0
Alum ..	" ..	598.7	584.2	591.5	340.6	88.3
Fresh fruits ..	" ..	57.9	202.1	130.0	19.1	227.9
Potatoes ..	" ..	117.9	154.0	135.9	295.1	356.8
Salt butter ..	" ..	71.7	63.9	67.8	6.3	..
Eggs ..	" ..	58.5	39.9	49.2	..	2.0

Table III.—RETURN of British Shipping at the Port of Rouen in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.		Total Number of Vessels.		Total Tonnage.		Total Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	Total.
631	...	631	188,383	...	803	498	305	823,194	£ ..
									10,862

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.										Cleared.									
Countries whence Arrived.			Number of Vessels.		Tonnage.		Number of Crews.		Value of Cargoes.	Countries to which Departed.			Number of Vessels.		Tonnage.		Number of Crews.		Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	
Russia	58	...	56,320	...	56,320	1,132	...	1,132	£	Russia	...	...	...	...	1,023	...	...	24	No means of finding out.
United States	39	...	59,686	...	59,686	914	...	914	...	United States	...	...	...	...	16,603	...	...	260	...
Romania	27	...	28,257	...	28,257	560	...	560	...	Norway	...	...	...	...	2,289	...	...	31	...
Norway	24	...	20,464	...	20,464	431	...	431	...	Sweden	...	...	...	...	1,444	...	...	31	...
Sweden	21	...	18,099	...	18,099	378	...	378	...	Spain	...	...	...	...	15,804	...	...	332	...
Spain	17	...	12,236	...	12,236	283	...	283	...	Germany	...	...	...	...	1,259	...	...	21	...
Turkey	10	...	11,662	...	11,662	218	...	218	...	Italy	...	...	...	...	1,244	...	...	18	...
Greece	4	...	3,537	...	3,537	75	...	75	...	France	...	...	...	...	2,647	...	...	136	...
Algeria	4	...	3,272	...	3,272	72	...	72	...	Belgium	...	...	...	...	1,301	...	...	22	...
Austria	3	...	3,054	...	3,054	60	...	60	...	West Coast of Africa	...	...	...	...	...	...	...	20	...
Canada	2	...	2,767	...	2,767	41	...	41	...						652				
Germany	2	...	2,627	...	2,627	88	...	88	...						...				
Italy	2	...	2,617	...	2,617	83	...	83	...						...				
Egypt	1	...	1,214	...	1,214	23	...	23	...						...				
France	3	...	1,084	...	1,084	42	...	42	...						...				
New Zealand	2	...	2,599	...	2,599	49	...	49	...						...				
Holland	1	...	99	...	99	6	...	6	...						...				
Total	224	...	229,453	...	229,453	4,404	...	4,404	...	Total	...	...	6	42	48	5,251	40,970	46,221	895

Table IV.—Showing some of the Largest Ships that Entered Rouen Harbour during the last Six Months in 1893.

Dates of Entry.	Ship's Name.	Nationality.	Where from.	Cargo.	Quantity.	Draught of Water on Entry.
					Tons.	Ft. in.
July 1	"Leo"	British	New Orleans	Wheat	2,650	21 9
" 28	"Vala"	"	"	Maize and wheat	3,289	21 0
" 31	"Yedmandale"	"	"	"	2,750	21 6
Aug. 1	"Othello"	"	Melbourne	Wheat	2,280	21 6
" 4	"Jeanne Conseil"	French	Cette	Wine	1,700	21 3
" 11	"Wild Flower"	British	Philadelphia	Petroleum	3,500	21 9
" 16	"Cadoux"	"	Philadelphia	Maize	2,300	21 3
" 26	"Luceline"	"	Odessa	Petroleum	3,750	21 9
" 28	"Jean Robertson"	British bark	Port Augusta	Wheat	2,500	21 6
" 28	"Ville-de-Cadix"	French steamer	Algiers	General cargo	2,070	21 3
Sept. 11	"Osseau"	British	Odessa	Maize	2,570	21 3
" 25	"Luigate"	"	New Orleans	Maize and wheat	3,150	21 6
" 25	"Wild Flower"	"	Philadelphia	Petroleum	3,469	21 9
" 25	"Plymouth"	British bark	New York	"	1,364	21 0
" 25	"Luceline"	" steamer	Philadelphia	"	3,750	22 0
Oct. 9	"Vindobala"	"	Batoum	"	1,960	22 0
" 26	"Wild Flower"	"	Philadelphia	"	3,400	21 0
Nov. 6	"Henriette H."	"	Riga	Oats and wood	2,300	21 3
" 6	"Pennopol"	"	Stockholm	Barley	2,600	21 0
" 27	"Lescaups"	Norwegian	Mariupol	Oats	2,195	22 0
" 27	"Shelly"	British	Salonica	Maize	2,700	22 0
Dec. 8	"Sully"	"	Poti	"	2,600	22 0
" 9	"Saddfield"	"	Taganrog	Barley	2,300	21 0
" 9	"Helo"	Norwegian	Sulina	Maize	3,070	21 9
" 11	"Ville-de-Valence"	French	Philippville	Wine	1,150	21 0
" 26	"Ida"	German bark	New York	Petroleum	1,300	21 0
" 26	"Conseil"	French steamer	Cette	Wine	1,740	21 0
" 27	"Fannie"	German..	Dedragath	Maize	2,410	21 6

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AND FINANCE.**

FRANCE.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF NANTES.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1209.

*Presented to both Houses of Parliament by Command of Her Majesty,
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FRANCE.

NANTES.

Acting-Consul Dickie to the Earl of Kimberley.

My Lord, *Nantes, April 21, 1894.*

I HAVE the honour to transmit herewith my Report on the Trade and Commerce of Nantes for the year 1893, together with the Report of Mr. Vice-Consul Warburton at La Rochelle, and that of Mr. Vice-Consul Rizat at Tonnay-Charente.

I regret that I have been unable to obtain the Report issued annually by the Chamber of Commerce, which contains much interesting information and which will not be issued until the month of May.

I have, &c.
(Signed) H. ELFORD DICKIE.

*Report on the Trade and Commerce of the Consular District of
Nantes for the Year 1893.*

ABSTRACT of Contents.

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Review of the Year.

There has been a marked improvement in the trade of Nantes during the past year, the shipping especially having shown an increased activity. To some extent this is attributable to the new maritime canal. The merchants and shipowners here entertain the hope that Nantes will now recover her former position as a busy port.

Shipping.

It will be seen from Annex A that the total number of vessels entering the port of Nantes during the year under review amounted to 1,263, measuring 203,512 tons, thus showing the enormous increase of 938 vessels, with an aggregate tonnage of 113,935 tons as compared with the previous year. The British vessels which entered numbered 91, measuring 48,379 tons, a decrease of 3 in the number of vessels, but an increase in the tonnage of 12,618 tons, due entirely to the increase of the tonnage of the vessels entering the port.

Canal de la
Basse-Loire.

A great number of large steamers and sailing vessels have passed through the maritime canal, and it is generally considered by those interested in the trade of Nantes that the success of the canal is now ensured. Every effort is being made to induce vessels of large tonnage to come up the river to Nantes, instead of discharging, or in part discharging, at St. Nazaire, as was necessary before the construction of the canal.

Imports and Exports.

The chief articles of import and export are given in Annex B. The former show a very considerable increase, especially in the quantities of coal and cereals imported. On the other hand, the exports have much decreased both in quantity and in value.

Sardine
fishery.

The catch of sardines was much more satisfactory during the past season; great quantities were taken all along the coast of the department of the Loire Inférieure, most of which were brought up by the different firms who preserve and tin them. Quantities also of fresh sardines found their way to the Paris market, where the Nantes sardines are held in high esteem.

Preserved
vegetables

One of the chief industries at Nantes is the preserving of summer vegetables, the crop of which owing to the continued drought was reduced to less than one-third of the usual yield; the prices paid for the same were high in proportion, some of the finer vegetables being so scarce that they were sold at five times the value realised in the preceding year.

Population.

The population of Nantes has somewhat decreased during the past year. By last census there were 122,750 inhabitants.

Public Health.

About June 15 last cholera again made its appearance. It would appear that this much-dreaded disease, of which a few isolated cases occurred as far back as the month of September, 1892, had never been completely stamped out, and reappeared at the commencement of the warm weather. Between June 15 and October 15 over 1,000 cases were reported to the sanitary authorities, and out of this number no fewer than 390 cases proved fatal.

The epidemic was entirely attributable to the bad water supplied to the town, the point at which the water is drawn being in close proximity with a cemetery, and the outlet of some of the town sewers. Cases of cholera also occurred at Croisic, the Island of Noirmoutiers, L'Île Dieu and Sables d'Olonne. Wherever the disease made its appearance energetic measures were taken by the local authorities to prevent its spreading.

As is usually the case the poorer classes suffered most, and persons not paying sufficient attention to personal cleanliness or of intemperate habits.

General Remarks.

It is somewhat surprising that so few commercial houses in England send representatives to this part of the country. English hardware and cutlery are highly esteemed, and would find a ready sale if properly brought to the notice of the public by such channels as commercial travellers for example. This also applies to woollen fabrics, blankets, carpets, and tweeds. English goods are, of course, imitated in France, and with a certain degree of success, but the prices are not much lower, and the quality in most cases vastly inferior.

As far as I can ascertain it is only the better class of goods which would find a market. The cheap kinds would not in all probability be able to stand the high protective duty. I shall be glad to give any information and assistance in my power to merchants who may desire to introduce their manufactures into this part of France.

Annex A.—RETURN of all Shipping at the Port of Nantes during the Year 1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	11	4,138	80	44,241	91	48,379
French	198	21,206	857	90,210	1,055	111,416
Swedish and Nor- wegian	15	4,883	35	11,655	50	16,538
German	2	631	15	7,883	17	8,514
Danish	5	1,495	1	648	6	2,143
Other countries ...	12	3,477	32	13,046	44	16,522
Total	243	35,830	1,020	167,682	1,263	203,512
„ for the year preceding ...	176	33,012	149	58,565	325	89,577

(1748)

A 3

FRANCE.

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	11	4,188	78	42,713	89	46,901
French	196	20,366	856	98,243	1,051	118,609
Swedish and Nor- wegian	16	4,705	23	11,848	49	16,553
German	4	1,456	12	6,507	16	7,963
Danish	5	1,695	2	713	7	2,408
Other countries ...	13	3,834	30	12,201	43	16,035
Total	244	36,194	1,011	170,225	1,255	206,419
" for the year preceding ...	196	33,904	190	66,190	373	100,994

Annex B.—RETURN of Principal Articles of Import from the Port of Nantes during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Wines and spirits ...	Gallons ...	1,807,312	£ 111,597	2,093,166	£ 126,126
Sugar, raw, and refined	Tons ...	17,939·09	581,016	20,927·06	618,444
Iron, steel, and ore ...	" ...	3,927·13	38,933	7,161·01	39,998
Other metals	" ...	4,610·04	114,332	4,076·09	100,778
Coal	" ...	11,123·10	16,497	11,509·02	13,413
Timber	" ...	24,702·01	118,411	20,822·09	101,360
Coffee	" ...	331·12	61,511	347·04	65,464
Cocoa	" ...	1,646·02	216,156	1,229·06	161,745
Cereals, seed, and flour	" ...	9,865·19	168,214	723·11	13,533
Combed hemp	" ...	1,120·07	66,224	1,344·06	83,204
Animal charcoal ...	" ...	2,021·17	8,571	2,353·12	10,021
Olive oil	" ...	875·01	71,403	552·19	51,259
Other articles	" ...	24,701·14	1,610,156	22,220·17	1,048,824
Total	Gallons ...	1,807,312	3,123,601	2,093,166	2,436,174
"	Tons ...	112,913·09		83,253·00	

RETURN of Principal Articles of Export from the Port of Nantes during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Wines and spirits ...	Gallons ...	140,250	£ 21,277	122,678	£ 18,434
Cereals and flour ...	Tons ...	1,807·16	26,196	15,413·08	226,104
Preserved provisions ...	" ...	350·02	43,738	291·03	36,265
Hardware, rails, &c. ...	" ...	462·04	28,697	612·19	38,292
Coal	" ...	3,198·07	4,514	3,677·11	5,029
Oil cake	" ...	236·10	4,087	372·15	4,771
Cast-iron and ironmongery	" ...	1,869·06	23,195	170·12	2,685
Finishing materials ...	" ...	6,373·03	13,875	4,798·02	9,250
Other articles	" ...	11,553·13	389,459	16,683·10	584,189
Total	Gallons ...	140,250	555,638	122,678	924,649
"	Tons ...	26,367·61		41,244·80	

SAINT NAZAIRE.

Shipping.

The returns of shipping and of the imports and exports at St. Nazaire are hereto annexed. The number of vessels of all nationalities which entered the port during the year 1893 amounted to 1,495, with aggregate tonnage of 837,381 tons; this showing a decrease of 194 vessels and 53,065 tons as compared with the previous year. This falling off both in numbers and tonnage may to a great extent be attributed to the strikes in the coal districts in Wales, the effects of which were keenly felt in this part of France, and also to the strike of dock labourers at St. Nazaire last spring, which almost paralysed the shipping for about six weeks at that port.

The opening of the Maritime Canal of the Basse Loire has tended to diminish the number of ships entering St. Nazaire.

The British vessels which entered during the past year numbered 435 with an aggregate tonnage of 418,713 tons, a decrease of 102 vessels, 33,296 tons. Since the beginning of the present year, however, the shipping has resumed its former activity.

Imports and Exports.

The principal articles of import and export are described in Annex B, from which it will be seen that the imports show a decrease of 129,383 tons and 871,174 gallons as compared with the year 1892. The falling off was chiefly in coal and wine, the unusually good vintage rendering it unnecessary to import the latter from the outlying districts.

The exports show a decrease of 24,471 tons, and an increase of 505,166 gallons.

The Chantiers de la Loire have been fairly busy owing to the ^{Ship-building.} number of contracts received for war vessels from the French Government. The ironclad "Jemmapes" and the torpedo catcher "D'Iberville" were completed and delivered during the latter part of the year, and are, I am informed, considered highly satisfactory. The ironclad "Valmy" is now in the Penhouet dock and nearly completed. The ironclad "Massena" and the swift cruiser "D'Assas" are now on the stocks. No merchant vessels have been constructed in the yard during the past year. The number of workmen employed is about 1,800.

The Chantiers and Ateliers of the General Transatlantic Company give employment to 2,100 men, and owing to the large fleet of vessels owned by this important Company and the repairs thereby necessitated the work is almost constant. The "Navarre," a fine mail steamer, was completed during the year for the line between St. Nazaire and Vera Cruz, her tonnage being 6,960 tons (gross) with a speed of over 17 knots per hour. This vessel is most luxuriously fitted.

(1748)

Building. The house-building industry has been very active in St. Nazaire for the last few years; new houses and fine buildings having sprung up in all directions.

Over 200 dwelling houses have been built during the year 1893, the majority of which are large buildings to be let out in flats. A new Chamber of Commerce and a new Post Office have also been erected.

Fisheries. The fishing industry at Croisic is the third or fourth in importance in France. During the year it has been fairly satisfactory, the quality of the fish being good and the prices obtained relatively high. The tunny fish sold exceptionally well.

About 268 fishing boats measuring 1,523 tons and manned by 1,157 men are attached to the port of Croisic, or rather to that district which extends from the mouth of the River Vilaine to Pornichet. The value of the fish taken last year may be estimated at 1,700,000 fr. The larger portion of the fish is sent to the Paris market, but quantities are sent to towns in the east of France and even to some districts in Germany.

The methods of oyster and mussel culture in this district are exceedingly successful. The system employed is original and might be applied with advantage on the coast of Wales and protected parts of the west of Scotland.

An interesting report has been written on this subject by Professor W. A. Herdman, D.Sc., F.R.S., who visited the Bay fisheries last summer. This report is published by Messrs. T. Dobb and Co., 229, Brownlow Hill, Liverpool.

Summer resorts. Of late years several watering places in the vicinity of St. Nazaire have become known and are much frequented by Parisians. The whole coast is planted with pine trees, which, together with the mild climate, render it particularly suitable to persons suffering from throat and chest affections.

Pornichet, La Baule, Le Pouliguen, and La Plage St. Marguerite are the most convenient.

Population.

The population of St. Nazaire amounted to 29,206 inhabitants by the last census. During the past year there were 879 births, 246 marriages, 708 deaths.

Public Works.

A project for the construction of a new entry to the port of St. Nazaire has been voted by the French Government, it includes designs for an outer harbour.

It is believed that these improvements will greatly increase the importance of St. Nazaire as a port.

Annex A.—RETURN of all Shipping at the Port of St. Nazaire during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	3,450	431	331,967	435	335,417
French	435	27,148	534	340,314	969	367,462
German	8	5,717	5	2,847	13	8,564
Russian	1	528	1	880	2	1,408
Swedish	4	1,036	1	755	5	1,791
Norwegian	11	5,700	5	3,273	16	8,973
Danish	1	1,209	2	1,788	3	2,997
Dutch	1	75	3	3,045	4	3,120
Belgian	...	...	2	864	2	864
Spanish	...	...	44	55,114	44	55,114
Italian	2	1,671	...	...	2	1,671
Greek	...	...	...	...	...	...
Total	467	46,534	1,028	780,347	1,495	837,381
„ for the year preceding ...	436	45,845	1,203	845,601	1,639	891,446

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	3,450	433	333,696	437	337,146
French	443	28,803	540	343,564	983	372,367
German	10	5,281	3	2,847	13	8,128
Russian	1	528	1	880	2	1,408
Swedish	4	1,036	...	...	4	1,036
Norwegian	13	6,480	4	3,598	17	10,078
Danish	1	179	2	2,099	3	2,278
Dutch	1	75	3	3,045	4	3,120
Belgian	...	...	2	864	2	864
Spanish	...	...	45	56,473	45	56,473
Italian	2	1,671	...	...	2	1,671
Greek	...	...	1	845	1	845
Total	479	47,503	1,034	797,911	1,513	845,414
„ for the year preceding ...	489	55,579	1,200	845,910	1,689	910,489

Annex B.—RETURN of Principal Articles of Export from
St. Nazaire during the Years 1893-92.

Articles.		Quantity.	
		1893.	1892.
Coal	Tons	55,388	78,091
Eggs and poultry	"	7,012	6,090
Sardines	"	3,586	1,826
Salted butter	"	1,129	1,628
Preserved meat	"	200	206
Bone-dust	"	214	707
Grain and flour	"	1,029	6,175
Potatoes	"	3,612	5,229
Dried vegetables	"	424	842
Timber	"	539	1
Prepared dyes	"	163	911
Clothing, ready-made ..	"	388	239
Paper	"	931	754
Machinery	"	361	472
Tools	"	48	410
Coffee	"	456	307
Hardware	"	13	1,098
Glass	"	3,966	2,373
Leather	"	277	539
Iron bars and rails ..	"	180	795
Steel rails	"	33	..
Vegetables	"	1,080	553
Toys	"	239	218
Other goods	"	25,859	22,134
Wine, ordinary	Gallons	888,274	779,434
Brandy	"	771,544	375,218
Total	Tons	107,127	131,598
"	Gallons	1,659,818	1,154,652

RETURN of Principal Articles of Import to St. Nazaire during
the Years 1893-92.

Articles.		Quantity.	
		1893.	1892.
Coal	Tons	676,533	829,105
Cereals and flour	39	30,911	59,602
Manure	39	11,717	2,458
Rice	39	4,378	2,467
Timber	39	30,648	17,214
Cement	39	368	642
Iron ore	39	100,453	88,100
Tar	39	10,297	13,653
Bar-iron	39	644	34
Pig-iron	39	2,303	1,681
Lead	39	3,023	3,969
Raw cotton	39	11	144
Coffee	39	476	440
Oils	39	31	155
Hemp	39	325	241
Machinery	39	161	105
Other goods	39	54,784	36,436
Wine, ordinary	Gallons	861,106	1,732,280
Total	Tons	927,063	1,056,446
"	Gallons	861,106	1,732,280

LA ROCHELLE.

Mr. Vice-Consul Warburton reports as follows :—

There has been a falling-off in the trade of this port during Trade the past year, and as will be seen by the tables sent this affects diminished. both exports and imports.

Exports.

Exports show a reduction of nearly 3,000 tons, but this has been a feature in the trade of this country for some years past.

Imports.

Imports have fallen off by over 30,000 tons, which is all in Coals. coals from Great Britain, owing to the strike having increased the price to such an extent that during some weeks importations were almost entirely suspended.

The amount of pitch and tar increased by nearly 40 per cent. Pitch and tar. Glasgow sends most of it to this port.

Wood imports are 20 per cent. more, and this is principally Wood. derived from Sweden and Norway.

Of wine, 7,000 tons less came in 1893 than in 1892, owing to Wine. the increased duties on Spanish and Italian wines.

Chemical manure.	A considerable trade in phosphates for manure has arisen of late owing to the opening of the port of La Pallice, which enables large vessels to bring it across direct from America; 6,000 tons of it were imported, mostly from South America, but some from Belgium and England.
Naphtha and petroleum.	The port of La Pallice also received several cargoes of naphtha and petroleum (in all probably worth between 80,000 <i>l.</i> and 100,000 <i>l.</i>) shipped from New York and Philadelphia.
Forage and litter	An entirely new feature in the imports to La Rochelle was the arrival last year of hay from the Argentine Republic, oats from Turkey, and moss litter from Holland. The hay is not thought much of, nor the oats, which was light; the moss litter seems to have been more appreciated.

British Products and Manufactures.

Sale of British goods diminishing. The sale of British goods has certainly decreased here. This is owing to several causes, the increased protective duties, and the time and trouble required to clear them through the custom-house, though a serious drawback, would not alone have been sufficient to prevent their continued use, but the French makers are reducing the cost of production in many competing articles, and selling them cheaper than they did, helped in doing so probably by the lower rate of wages, and in many cases also by the longer hours worked by their men.

They are at the same time taking a good deal of trouble to suit the taste and requirements of the public in little matters where our manufacturers are stationary, paying no attention to, and perhaps not being aware of the little details in which the people of this country have to be suited.

A case in point is that of cheap china for breakfast and dinner services. A great deal of this used to be of English make, but I find now that the dealers no longer keep it in stock, and the reason they give me is, that the customers who bought services from them are constantly asking for duplicates to replace broken plates and dishes, and they cannot always get them of exactly the same pattern, whereas French makers always keep to the old designs as well as bring out new ones, and they are therefore obliged to point out to their clients, that though the English patterns are neat and cheap, it may be better for them to pay a little more for French ones on account of the certainty that when they want a dozen or two more of plates at some future time they will be sure of getting them.

With regard to many articles, there is the old grievance about the absence of commercial travellers from England, nearly all the shopkeepers buy in this way, and if British goods cannot be thus obtained they prefer to take French ones.

With a few exceptions the English articles still sold here are purchased through Paris houses, and a list of them may be useful.

First in importance is coal, of which about 200,000 tons is im-

ported annually; then pitch and tar, of these 5,000 tons to 6,000 tons, all sea-borne.

Of manufactured and other goods, imported through indirect routes, and of which the quantities cannot be ascertained, we have the following:—

Agricultural machinery and implements, particularly reaping and mowing machines, rakes, ploughs, hay and straw cutters, and stonebreakers, cycles, and a number of articles of hardware of a trifling kind.

A great deal of notepaper and stationery, linoleum, carpets, drapery, and hosiery, especially “all wool” vests and drawers, socks of mixed wool and cotton, leather gloves of a strong description, and neckties, needles, and pins.

Cloths and woollen mixtures for men’s clothing, felt hats, starch, tinned meats and fish, biscuits, pickles, sauces, mustard in tins, orange marmalade, hams, lard, and some (but very little) cheese.

All these articles are being met with very keen competition from similar French ones, and from this and the other causes I have noticed above are sold in much smaller quantities than formerly.

Shipping and Navigation.

Shipping shows a considerable increase in 1893, especially British, which is more by 5,000 tons than in 1892. This is owing to the larger size of the vessels now beginning to come to the port of La Pallice, and may be expected to continue. British shipping increased.

The increase would have been still greater but for the present tendency to sail English ships under foreign flags, the result of which is that vessels owned in England and trading to this port have to be classed as foreign. Transfer of British vessels to foreign flags.

The last one I saw at the port of La Pallice was under the German flag, commanded and manned by Germans, who were highly spoken of as seamen, and whose wages are so much lower than those paid to British seamen that there is a large saving on this item alone, and for this and other reasons I am told that they are paying much better than they could have done under our own flag.

This port is now in working order, and a little branch of the custom-house established there received last year 120,000*l.* in duties.

A great American petroleum company has purchased the site for a dépôt of oil there at a cost of 120,000*l.*, which will probably increase the shipping very much during the present year, and I believe that one of our greatest British ocean steamship companies* is about to transfer their headquarters to it from another French port, where they are now suffering great inconvenience by want of sufficient depth of water for their large vessels, besides which, through the avoidance of river navigation, they will save at least 24 hours on each voyage from South America. Port of La Pallice.

* Since this report was written the Pacific Steamship Company of Liverpool has decided to transfer their station from the Bordeaux River to La Pallice on July 1.

The largest British vessel which entered in 1893 was one of nearly 2,000 tons from the Argentine Republic with a cargo of hay, but there is no limit to the size which can be accommodated, the present depth available being as follows:—

				Outer Port and Lock.	Inner Dock.
				Feet in.	Feet in.
High water—					
Spring tides	..	..	..	35 5	32 2
Neap tides	..	..	..	31 8	28 5

and the two repairing docks which are at present in use have respectively: in the larger, 30 ft. 6 in.; and in the smaller, 26 ft. 9 in.

Vessels arriving at low water find a very safe anchorage with over 33 feet of water a few hundred yards from the entrance to the port, so that ships of the greatest draught arriving at low water have only a very short wait before they are admitted, while if of moderate draught they can enter at any time.

Owing to the port being close to the open sea the pilotage charges are low, being for vessels of 1,000 tons (steamers) from the sea to the roads 2*l.* 2*s.* 8*d.*, and from the roads into the harbour 1*l.* 2*s.*; in all from open sea into port 3*l.* 4*s.* 8*d.*

Freights.

Freights remain still very low, being from Welsh ports to La Rochelle (for coals) from 4*s.* 5*d.* to 4*s.* 10*d.*

Sanitary
state of the
town.

The sanitary state of La Rochelle has been fairly good, except for the usual epidemic of influenza which comes on regularly every winter, but was this time of a mild type.

Continued
decrease of
the popula-
tion.

The population, however, still shows a decrease, the deaths continuing to be more numerous than the births, which has been a marked feature in the returns from this country for some years past.

Price of
bread.

The loaf of 5 lbs. has averaged in price, for the best bread, nearly 7½*d.*, and for the second quality, 6½*d.*

Agriculture.

Effects of the
drought.

The year 1893 was the worst which farmers have had in this district for many years, owing to the prolonged drought in spring and summer. This made forage so scarce that hay went up to nearly 8*l.* per ton, and straw to 5*l.*, and the farmers being unable to feed their stock, cattle were sold for anything they would fetch.

Fortunately when things were at the worst in autumn there was a heavy rainfall which started a fresh growth of grass, and this being followed by very mild weather stock were able to be left out all the winter with little additional feeding.

Fall in price
of wheat.

Nearly all crops made a bad return, and the only one which did fairly well in some places was wheat, and it was of exceptionally good quality though short in quantity.

But this was of no help to farmers, because, owing to a large importation of foreign wheat, prices fell lower than ever, and not only is French grown wheat cheaper than usual but it also this year is cheaper than the foreign grain. Foreign wheat sells dearer than native.

This as usual caused a demand for more protection, and an addition has been made to the former tariffs, which agriculturists hope will help them during the coming season.

The only crop which benefited by the hot and dry summer was Vines. the grape crop, and this was the best we have had for many years, having yielded 20,589,000 gallons in the department of the Charente Inférieure against 9,000,000 gallons in 1892, but the owners of vineyards complain bitterly of the small price offered to them for their wine, and the local newspapers plainly and openly state the reason for it to be that the process of making cognac out of beetroot and potato spirit has reached such a degree of perfection that the wine of this district, out of which it used to be made, is no longer necessary.

A new experiment is about to be tried here in the shape of Agricultural an agricultural credit society, or bank, for the purpose of making banks. loans to distressed small farmers.

The capital for starting it has been provided by using for the purpose the share allotted to this department out of the sum of 200,000*l.* voted by the Chamber of Deputies for the relief of agricultural distress last year, and it is proposed to lend sums of 5*l.* (which in exceptional cases may be increased to 20*l.*) for periods of 3 months, at a rate of interest exceeding that of the Bank of France by 1 per cent., these loans to be renewable for similar terms at a charge of $\frac{1}{2}$ per cent. for commission on each renewal.

The health of animals has been good, and no disease occurred during 1893, but this week (March 12, 1894) an outbreak of foot- and-mouth disease has been reported as having broken out close to La Rochelle. Sanitary state of animals.

RETURN of all Shipping at the Port of La Rochelle during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	1,831	99	71,990	101	73,821
French	33	11,309	105	63,313	138	74,622
Swedish and Norwegian	6	5,442	8	3,643	14	9,085
Other flags	10	4,871	16	11,514	26	16,385
Total	51	23,453	228	150,460	279	173,913
„ for the year preceding	37	13,812	239	146,879	276	160,000

FRANCE.

CLEARED.*

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	1,831	99	71,990	101	73,821
French	21	9,423	83	49,500	104	57,923
Swedish and Norwegian	7	4,996	23	12,099	30	17,095
Other flags	5	1,744	26	18,123	31	19,867
Total	35	17,994	231	150,712	266	168,696
„ for the year preceding	20	10,643	246	143,808	301	156,674

RETURN of Principal Articles of Export from La Rochelle during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.*	Quantity.	Value.*
	Tons.	£	Tons.	£
Spirits	1,780	..	1,847	..
Wood	1,071	..	48	..
Empty casks	1,833	..	1,442	..
Fruit and vegetables	16	..	23	..
Other articles	2,420	..	12,455	..
Total	6,670	..	16,669	..

* Not ascertainable.

RETURN of Principal Articles of Import to La Rochelle during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coals	200,842	290,000	221,182	300,000
Pitch and tar	5,779	11,000	4,067	8,000
Wood	12,005	220,000	9,980	200,000
Wine	14,772	150,000	21,850	213,000
Spirits	151	..	135	..
Salted codfish	1,405	40,000	1,427	40,000
Other articles	44,319	..	43,589	..
Total	279,273	..	301,738	..

TONNAY-CHARENTE AND ROCHEFORT.

Mr. Vice-Consul Rigat reports as follows:—

The trade of the ports of Tonnay-Charente and Rochefort has Trade, again been moderate this year.

The decrease on imports, principally coals, showing 33,600 tons Imports, less than 1892; this may be attributed to the long pending strikes in England (see Table B).

On the contrary, there is a steady increase in phosphate of lime; wheat, phospho-manure, ammonia, and coal-tar pitch have not fallen off.

A fair tonnage of pyrites against last year.

The exports of brandy show a decrease of 3,910 tons compared with 1892; but large quantities have taken other directions for re-exportation, which may, to a certain extent, lessen this decrease (see Table B).

Shipping and Navigation.

The number and tonnage of British ships entered and cleared in 1893 are:—509 ships, of 276,874 registered tons, thus showing an increase over 1892 of 56 ships, of 19,496 registered tons.

Foreign ships entered and cleared represent 158 ships of 97,658 tons.

TABLE showing the Total Number and Tonnage of Ships Entered and Cleared in 1893, compared with 1892.

Nationality.	Number of Vessels.	Tons.
British	509	276,874
Foreign	158	97,658
Total	667	374,532
„ 1892	618	363,069
Increase, 1893	49	11,463

Annex A.—RETURN of all Shipping at the Ports of Tonnay-Charente and Rochefort during the Year 1893.

ENTERED.

Year.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	10	5,821	244	132,397	254	138,218
French	7	672	35	26,316	42	26,988
Belgian	...	...	11	3,019	11	3,019
Norwegian	14	9,759	3	2,185	17	11,944
Danish	1	190	2	1,862	3	2,052
Swedish	...	...	1	630	1	630
Spanish	...	...	2	1,916	2	1,916
Russian	2	800	...	...	2	800
German	5	2,809	1	489	6	3,298
Dutch	1	887	...	...	1	887
Austrian	1	915	...	...	1	915
Total	41	21,853	299	168,814	340	189,076
„ for the year preceding ...	26	9,909	274	166,230	300	176,219

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	10	5,821	245	132,835	255	138,656
French	...	...	35	26,316	35	26,316
Belgian	...	...	11	3,019	11	3,019
Norwegian	14	9,759	3	2,185	17	11,944
Russian	1	421	...	...	1	421
German	5	2,809	1	489	6	3,298
Dutch	1	887	...	...	1	887
Austrian	1	915	...	...	1	915
Total	32	20,612	295	164,844	327	185,456
„ for the year preceding ...	33	11,908	285	174,942	318	186,850

Coasting and
fluvial
navigation.

This trade has been effected during the year at the ports of Tonnay-Charente and Rochefort by 3,936 ships or craft, with a total of 234,511 tons.

Annex B.—RETURN of Principal Articles of Import to Tonnay-Charente and Rochefort during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Coal and patent fuel	Tons ...	167,400	142,390	201,000	144,500
Coal-tar pitch	„ ...	5,230	8,400	4,500	1,100
Phosphate of lime	„ ...	17,000	34,400	10,000	12,500
Phospho manure	„ ...	7,900	57,900	7,600	38,000
Sulphate of ammonia	„ ...	900	9,000	...	...
Pyrites	„ ...	8,200	9,200	...	...
Other articles	„ ...	2,700	...	...	...
Wood, timber, deals, and boards	Loads of 50	...	...	...	...
	sq. feet ...	30,000	...	30,400	...
Wheat, oats, and barley	Quarters ...	128,000	164,000	113,500	...

RETURN of Principal Articles of Export from Tonnay-Charente
and Rochefort during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Brandy	Gallons ...	3,320,000	1,750,000	3,992,000	2,164,000
Consisting of 60 vats, 491 puncheons, 17,615 hogs- heads, 32,336 quarter casks, 6,671 octaves, 516,836 cases, equal to	Tons ...	27,000	...	30,910	...
Pyrites	??	5,050	5,050	...	...
Guano	??	4,350	31,320	...	...
Oysters	??	340	68,000	...	...
Eggs	??	83	4,330	...	...
Bottle straw envelopes (27,200 gross)	??	340	3,130	...	...
Wines, champagne and common	??	80	4,000	...	...
Green fruit	??	20	400	...	...
Butter	??	6	800	...	...
Other articles	??	40	...	12,395	101,225
Total	...	37,309	1,967,030	43,805	2,265,225

Agriculture.

It is interesting to compare the superficial surface replanted in Vineyards. ■
vines in the two departments of La Charente and La Charente
Inférieure.

The vineyards cultivated were:—

Year.						Area.
						Acres.
1892..	..	..	..	..	..	120,452
1893..	..	..	..	..	..	132,135
Increase, 1893						11,683

From every quarter it is said that all growers are replanting,
and in a very short period we might see this figure nearly doubled,
as the results of the new plants are very satisfactory.

The dry weather, during the whole spring and summer, has Wine.
been most profitable to the wines.

The total crop of these departments amounted to:—

Year.						Quantity.
						Gallons.
1892..	..	..	..	..	..	10,271,000
1893..	..	..	..	..	..	24,097,590
Increase, 1893						13,826,582

more than double that of last year, with an alcoholic strength of
9 per cent. on an average.

- Brandy. Most of the wine gathered has been and is to be destined for distillation, and the brandy is reputed as good as in the celebrated vintages.
- Wheat, oats, other grains. These crops have been very poor this year in consequence of the excessive dryness. Prices of wheat have not changed on account of the large imports, but oats have doubled in price compared with last year.
- Potatoes.
- Hay. This crop turning short also by continual want of rain has had the greatest importance in this district, where there are so many cattle breeders: prices have fetched the high figure of 8*l.* per 1,000 kilos., the average price being about 2*l.*
- Horned cattle. In consequence of this many cattle breeders, for want of their own fodder, have been compelled to slaughter and sell the meat at the low average price of 5*d.* per lb. This price, however, did not last long, and quotations soon reached higher and regular figures.
- Horses. This branch is still well doing, horse breeders being very careful to improve the quality of the breed.
- Public health. Public health has remained satisfactory.

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AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF DUNKIRK.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1237.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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F R A N C E.

DUNKIRK.

Consul Taylor to the Earl of Kimberley.

My Lord, *Dunkirk, May 19, 1894.*
I HAVE the honour to enclose herewith my Report on the
Navigation, Commerce, Trade, &c., of Dunkirk for the year 1893.
I have, &c.
(Signed) EDWARD TAYLOR.

*Report on the Navigation, Commerce, Trade, &c., of Dunkirk for
the Year 1893.*

ABSTRACT of Contents.

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It may be stated that the trade of the port of Dunkirk during the year 1893 was in a satisfactory condition, for though the imports fell off compared with the 3 preceding years, yet there was a considerable increase on all years previous to 1890. General review.

The exports have been larger than in any former year except 1890, in which year there were very large exports of sugar.

(1780)

The entries of shipping show an increase notwithstanding the decrease in imports, this was owing to a larger number of vessels entering in ballast and also to more vessels than usual having either left part of their cargo at Havre, or taken on part of it to Antwerp or the United Kingdom.

The increase in 1893 compared with 1892 in shipping entered amounted to 78,440 net register tons, in imports the decrease was 91,592 tons,* but in exports there was an increase of 60,035 tons.

Population.

Population.

The health of the town of Dunkirk has been satisfactory, during the past year the deaths numbered 1,104, a reduction of 16 compared with the year 1892. The infant mortality was however high, 407 children having died under 1 year of age; the chief infantine illnesses were diarrhoea and measles, of the former 165, and of the latter 52 children died, all under 1 year of age.

During the year 1893 the movement of the population (rather over 41,000), fixed and floating, was as follows: 1,331 births (increase 160), and 1,104 deaths (decrease 16), of the births 705 were male and 626 female, of the deaths 589 were male and 515 female; 317 marriages were celebrated and 17 divorces granted during the year. Out of the total number of 1,331 births, 147 or 11.04 per cent. were illegitimate.

RETURN of all Shipping at the Port of Dunkirk during the Year 1893.

ENTERED

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	261	112,665	1,017	709,699	1,278	822,364
French, foreign ...	158	46,865	222	208,971	380	255,836
French, coasting ...	312	22,892	409	188,962	721	211,854
German	37	12,657	146	79,567	183	92,224
Norwegian	39	20,653	29	14,683	68	35,336
Swedish	14	5,203	16	8,609	30	13,812
Danish	31	4,484	50	41,924	81	46,408
Dutch	1	1,499	61	9,392	62	10,891
Russian	10	3,637	8	5,252	18	8,889
Belgian	8	1,368	34	6,536	42	7,904
Italian	7	6,672	1	1,190	8	7,861
Greek	...	...	4	5,723	4	5,723
Austrian	...	...	6	4,812	6	4,812
American	3	4,494	...	...	3	4,494
Chinese	...	...	2	2,377	2	2,377
Argentine	...	...	1	1,525	1	1,525
Spanish	...	...	1	754	1	754
Total	881	242,439	2,067	1,284,603	2,888	1,527,042
... for the year preceding ...	957	312,603	1,953	1,136,399	2,910	1,448,902

* All tons of merchandise in this report are 1 015 kilos to the ton.

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	226	82,399	1,004	686,863	1,230	769,262
French, foreign trade ...	162	35,477	162	182,274	264	167,751
French, coasting ...	363	30,562	471	265,321	834	295,873
German ...	37	10,725	149	84,121	186	94,846
Norwegian ...	36	17,345	80	14,761	66	32,106
Swedish ...	12	4,599	16	8,922	28	13,521
Danish ...	33	4,419	62	44,622	85	49,041
Dutch ...	2	2,996	64	9,696	66	12,692
Russian ...	12	4,038	6	4,543	18	8,576
Belgian ...	1	123	34	8,119	35	8,242
Italian ...	6	5,215	1	1,759	7	6,974
Greek ...	...	...	4	5,723	4	6,723
Austrian ...	...	...	6	4,812	6	4,812
American ...	1	1,746	...	...	1	1,746
Chilian ...	...	...	2	2,377	2	2,377
Argentine ...	...	...	1	1,525	1	1,525
Spanish ...	...	...	2	1,174	2	1,174
Total ...	831	199,629	2,004	1,276,612	2,835	1,476,241
„ for the year preceding ...	963	320,577	1,937	1,125,752	2,900	1,446,329

The total tonnage of all nations, including French coasting, which entered Dunkirk in the year 1893 amounted to 1,526,442 tons, an increase on the preceding year of 78,440 tons. Increase in total tonnage.

Sailing vessels which in 1892 amounted to 312,603 tons, fell in 1893 to 242,439 tons, a reduction of 70,164 tons; this was owing to the much smaller imports of wheat and nitrate of soda. Steam tonnage amounted to 1,284,003 tons, an increase of 148,604 tons. Sailing vessels, decrease. Steamers, large increase.

The various increases and decreases in the entries of steam and sailing tonnage were as follows: — Increases: British, 29,692 tons; French coasting, 22,438 tons; foreign, 547 tons; Danish, 11,324 tons; Swedish and Norwegian, 10,818 tons; Austrian, 4,460 tons; United States, 2,575 tons; Russian, 2,455 tons; Chilian, 2,377 tons (none in 1892); Argentine, 1,525 tons (none in 1892), and Belgian 512 tons. Decreases: German, 4,927 tons; Greek, 1,687 tons; Dutch, 1,457 tons; Spanish, 947 tons; Italian, 521 tons; Portuguese, 393 tons, and Brazilian, 351 tons. Comparisons.

In the year 1893 the entries of British tonnage amounted to 816,394 tons (increase 29,692 tons), being 53·48 per cent. of the total entries including French coasters. But as the French coasting trade is reserved exclusively for French vessels it would be more correct to exclude it in making the comparison; the percentage of British shipping would then come out at over 62 per cent. of the total. This percentage shows that the British flag is well represented in the carrying trade of this port.

Of the 1,278 British vessels measuring 816,394 tons which entered in 1893, 414 vessels of 434,854 net register tons were in the indirect or carrying trade from foreign countries, and 864 vessels of 381,540 tons in the direct trade from the United Kingdom and her colonies. Carrying trade.

In 1892 the tonnage entering from the United States was the (1780)

most important of the indirect British carrying trade, that from Russia taking the fourth place, but in 1893, British shipping entering from Russia took the first place, the tonnage having trebled, while that from the United States fell more than 50 per cent.

The decrease in the entries in our carrying trade from foreign countries compared with the year 1892 was 37 vessels, 27,645 tons. The principal entries of tonnage were as follows:—From Russia 128,981 tons (increase 87,718 tons); United States, 63,314 tons (decrease 75,629 tons); Argentina, 62,114 tons (decrease 985 tons); Chile, 36,428 tons (decrease 29,733 tons); Roumania, 22,928 tons (increase 8,954 tons); Sweden and Norway, 20,627 tons (increase 3,499 tons); France and colonies, except Algeria, 21,012 tons, of which 9,050 tons from French ports were in ballast (increase 1,688 tons); Algeria, 7,277 tons (decrease 23,826 tons); Egypt, 19,108 tons (increase 948 tons); Spain, 19,045 tons (decrease 1,057 tons); Greece, 8,576 tons (decrease 132 tons); Mexico, 6,748 tons (increase 4,291 tons), and from Turkey, 5,332 tons (increase 3,032 tons).

Direct trade. In the direct trade 51 vessels of 109,331 tons (increase 45,119 tons) entered with cargoes from India, and 19 vessels of 33,087 tons (increase 8,291 tons) entered from Australia.

There cleared a total of 769,262 net register tons of which about eight-ninths were for the United Kingdom. A very small number of British vessels clear from Dunkirk loaded for foreign ports, several cargoes were, however, taken to Italy, Russia, and Spain. About 13,000 tons cleared in Ballast for the United States, and 12,000 tons for Spain. In 1893 several British vessels were sold to foreigners and a certain number laid up at the end of the year owing to want of freight.

French tonnage. French tonnage shows an increase of 22,438 tons in the entries in the coasting trade, but only an increase of 547 tons in the foreign trade.

The French total of 466,790 tons was made up as follows:—Entered in the foreign carrying trade 246,600 tons, from the Iceland fishery 8,336 tons, and in the coasting trade 211,854 tons. Upwards of 60 steamers measuring 53,317 tons included in the above 246,600 tons as entering in the foreign trade had discharged part of their cargoes at French ports, only completing the discharge at Dunkirk. The principal foreign countries and French colonies from which French vessels brought cargoes were Argentina, Spain, Chile, Germany, Uruguay, Senegal, Australia, Tunis, Algeria, United States, Russia, and Morocco, and the net register tonnage entering direct from these countries and colonies without discharging any part of their cargoes at an intermediate port was as follows:—From Argentina 43,954 tons, Spain 41,898 tons, Chile 25,181 tons, Germany 21,064 tons, Uruguay 8,651 tons, Senegal 8,148 tons, Australia 7,484 tons, Tunis 6,412 tons, Algeria 4,997 tons, United States 4,555 tons, Russia 3,638 tons, and Morocco 3,397 tons.

The clearances of French shipping with cargoes and part cargoes for foreign ports and French colonies amounted to 121,312

net register tons (an increase of 18,444 tons). The principal clearances were: for Algeria mostly calling at other French ports en route 41,198 tons (increase 9,324 tons), Tunis 13,619 tons (increase 8,589 tons), Senegal 10,707 tons (increase 4,125 tons), Spain 10,077 tons (increase 2,096 tons), and Argentina 8,535 tons (decrease 17,485 tons). It will be noticed that French clearances increased to her colonies and Spain but decreased very largely to Argentina. French tonnage amounting to nearly 40,000 tons cleared in ballast for foreign countries, of which about 16,000 tons went to Chile and about 14,000 tons to the United Kingdom.

The fleet which left Dunkirk for the Iceland fishery numbered 77 vessels of 8,090 tons, manned by 1,319 seamen, but 82 vessels of 8,336 tons entered the port from the fishery bringing 4,647 tons of cod (decrease 1,036 tons), and 237 tons of oil (decrease 27 tons). No serious casualty occurred to the Dunkirk fleet and only two men lost their lives during the fishing season. Although the catch was slightly under the average the fishery was satisfactory to all concerned owing to the remunerative prices obtained for the produce.

The chief changes in the entries of the shipping of other nationalities were an increase of 11,324 tons in Danish, and of 10,818 tons in Swedish and Norwegian, principally owing to increased imports of wood and petroleum; a number of Swedish and Norwegian sailing vessels brought petroleum, which used formerly to come in Nova Scotian vessels. The changes in the shipping of other foreign countries were of no real importance.

Trade and Commerce.

Of the gross imports into France during the year 1893, the percentage entering by the port of Dunkirk was as follows:—

TABLE showing Proportion of Total Imports into France Entering by Dunkirk.

Articles.							Per Cent.
Wheat	..	..	..	..	..	..	9
Barley	..	..	..	..	..	..	50
Oats	..	..	..	..	..	..	14
Maize	..	..	..	..	..	..	20
Wool (from the River Plate) ..	..	..	..	..	..	..	67
Jute	..	..	..	..	..	..	29
Flax	..	..	..	..	..	..	58
Cotton	..	..	..	..	..	..	8
Oil-seeds	..	..	..	..	..	..	29
Molasses	..	..	..	..	..	..	73
Iron ore	..	..	..	..	..	..	8
Zinc „	..	..	..	..	..	..	54
Pyrites	..	..	..	..	..	..	47
Petroleum	..	..	..	..	..	..	14
Nitrate of soda ..	..	..	..	..	..	..	78
Coal	..	..	..	..	..	..	1

RETURN of Principal Articles of Import to Dunkirk during the
Years 1893-92.

Articles.	Quantity.		From what Countries.
	1893.	1892.	
	Tons.*	Tons.*	
Linseed	102,532	77,606	India, Russia, Argentina
Rapeseed	46,603	14,890	India, Russia, Argentina
Other seeds	34,291	22,813	India, Russia
Rape and other cakes	21,668	8,951	England, Argentina, Russia
Ground-nuts. . .	19,634	12,975	Senegal, India
Wheat	126,491	265,928	United States, Russia, India, &c.
Rye	506	..	Russia
Barley	145,483	107,845	Russia, Algeria, Morocco, Turkey, &c.
Oats	46,690	12	Russia
Maize.. ..	67,319	79,342	Argentina, Russia, Roumania, &c.
Rice	15,358	5,388	French Indo-China, India
Nitrate of soda ..	106,525	179,505	Chile
Flax	42,540	38,461	Russia, Germany
Wool	89,020	90,012	Argentina, Australia, Algeria, &c.
Jute	17,324	17,174	India, viâ England
Cotton	15,037	19,118	India, Egypt, United States
Molasses	113,630	77,321	Germany
Petroleum	34,098	23,709	United States, Russia
Mineral oil	13,577	12,528	Russia, United States
Coal	117,448	136,440	England
Bitumen	36,952	44,607	England
Coal-tar pitch ..	29,562	32,211	England
Lead	4,479	2,947	Spain, England
Iron ore	119,609	189,609	Spain, Greece, Algeria
Zinc	18,601	19,202	Spain
Pyrites	26,467	31,838	Spain, Norway
Pig-iron	8,525	8,223	England, Spain
Machinery	4,758	4,022	England
Bricks	4,263	6,775	England
China clay	4,473	3,197	England
Wood. . .	82,893	58,737	Sweden, Norway, Russia
Other articles ..	120,832	187,304	
Total	1,637,098	1,728,090	

* Tons of 1,015 kilos.

Coasting
trade

The above table includes all merchandise entering by sea, except that entering in the coasting trade, which amounted to 92,493 tons in 1891, to 159,056 tons in 1892, and 124,837 tons in 1893.

Imports.

Imports decreased 91,592 tons compared with 1892. There was a very large falling-off in wheat, nitrate of soda, and iron ore; but an immense increase in oats, and a very considerable one in oil-seeds, barley, molasses, and wood.

Wheat.

The large decrease of 139,437 tons in the imports of wheat was owing to the large quantity of imported wheat stored in France

from the previous year. The wheat crop in this neighbourhood, though not a first-class one, was superior to the other cereal crops which were much damaged by the long-continued drought.

Oats and barley increased respectively 46,678 tons and 37,638 tons, these large increases, especially in oats, were the result of the great drought. Imports of oil-seeds also increased for the same reason, the colza crop in France having been a very bad one.

The imports of wood from Sweden and Russia, which decreased largely in 1892, showed a considerable increase in 1893. Wood.

The immense decrease of 72,980 tons was no doubt owing to the large stocks which had accumulated, and to the farmers having less money to expend on manure. Nitrate of soda.

There were much larger imports of molasses in consequence of the increased requirements of the distillers. Distilleries continue to increase in number, and there is little doubt that distilling spirits is one of the most profitable businesses in the North of France. Molasses.

Coal decreased 18,992 tons, and bitumen 7,655 tons, this was probably owing to the strikes in England. Coal.

Iron ore diminished 70,000 tons in consequence of a lessened demand and possibly also to more entering via Calais. Iron ore.

Flax increased 4,079 tons compared with 1892, in which year there was an increase of 11,854 tons compared with the preceding year. The crop was almost a failure in France in 1893. Flax.

The imports of jute, 17,324 tons, to Dunkirk were much the same as the preceding year. The total imports into France were 59,597 tons in 1893, 43,199 tons in 1892, and 60,419 tons in 1891. Raw jute varies so much in price that spinning has become quite a speculative business, those spinners who were fortunate enough to buy at the right moment have done well, for it varied in price as much as 5*l.* per ton during the year, the lowest prices being in January, and the highest in December, since then prices have gradually fallen, and for the quality chiefly used at Dunkirk, the price now (May) is about 14*l.* per ton. The reduction last year in the hours of labour from 12 to 11 per day at the same wages, has not been recouped to the spinners, though it is estimated that they only lose threequarters of an hour by the reduction, the other quarter of an hour being made up by increased diligence on the part of the workpeople. Jute.

RETURN of Principal Articles of Export from Dunkirk during the
Years 1893-92.

Articles.	Quantity.		To what Countries.
	1893.	1892.	
	Tons.*	Tons.*	
Sugar	73,472	61,882	England, Italy, United States
Glucose	809	2,787	England
Jute yarn	1,353	1,755	England
" socks	242	850	England, Algeria
Linen yarn	1,092	1,005	England
Woollen yarn	21	31	England
Cotton yarn	7	9	Senegal, England
Tissues	622	469	England, Algeria, &c.
Potash	3,698	3,638	England
Salt	5,311	4,467	Iceland fishery
Steel rails	5,756	4,773	Indo-China, Tunis, Algeria, &c.
Bar iron	3,760	3,939	Algeria, Indo-China, Belgium, &c.
Iron plates	291	270	Algeria, Indo-China
Ironwork, wrought and cast	3,705	1,844	Algeria, Tunis, Indo-China, Germany, &c.
Slates	2,750	2,744	England
Natural phosphates	28,585	6,596	England, Germany, Italy
Rags	3,373	2,669	England
Wheat	1,315	1,345	Belgium
Barley	595	866	Belgium
Flour	2,690	1,730	England, &c.
Flax	167	450	England
Oils	4,856	3,953	England, Belgium
Dry vegetables	777	951	England, Holland, Algeria
Green "	2,092	1,999	England
Potatoes	639	389	England, Iceland fishery
Fresh fruit	100	140	England
Bottles	1,860	2,021	England
Casks	9,130	5,473	Germany, England, United States, Algeria
Forage, hay, and straw	3,110	26,112	England
Bran	635	9,756	England, Denmark
Coal	91,547	40,363	Russia, England, Senegal, Algeria, &c.
Other articles	43,985	43,234	
Total	298,545	238,510	

* Tons of 1,015 kilos.

Exports,
coasting trade.

The above table does not include the goods leaving Dunkirk in the coasting trade (a trade reserved for French vessels), which in the year 1892 amounted to 295,986 tons, and in 1893 to 271,302 tons.

Exports.

Exports increased 60,035 tons; there were large increases in natural phosphates and coal, and an immense decrease in hay and straw.

Sugar.

Sugar exports, although they show an increase compared with 1892, are less than those of 1891, and must not be considered

favourable as far as regards the quantity sent to Great Britain, more sugar than usual having been sent to Italy and the United States. The crop of 1893 beet was small owing to the drought, though it was to some extent made up for by its superior saccharine quality.

The export of natural phosphates increased very considerably, this manure is chiefly sent to Great Britain, Italy, and Germany. ^{Natural phosphates.}

Coal exports increased 51,184 tons, about 40,000 tons went to Coal. Russia.

Jute sacks fell from 850 tons to 251 tons, they are exported chiefly to Great Britain, but some go to Algeria and Morocco. ^{Jute sacks.}

The various tissues are principally sent to Great Britain and the French colonies; they increased 163 tons. ^{Tissues.}

Steel rails were mostly exported to Indo-China, Algeria, and Tunis; they increased 983 tons. ^{Steel rails.}

The exports of hay and straw fell from 26,112 tons in 1892 to 3,110 tons in 1893. This immense reduction was the consequence of the prolonged drought, the hay crop being a complete failure and the yield of straw a very poor one. ^{Forage.}

Compulsory Port Charges and Brokerage Tariff.

As inquiries are sometimes made respecting port charges, I append below an account of the compulsory port charges and brokerage on a steamer of 2,000 tons net register, entering from South America with 3,200 tons of nitrate of soda and clearing in ballast:—

	Per Net Register Ton.	
	Fr. c.	Francs.
Navigation dues	1 00	2,000
Sanitary	0 15	300
Pilotage, inwards	0 10	200
„ outwards	0 10	200
Municipal tax	0 54	1,080
Tonnage	0 16	320
Chamber of Commerce Tax	0 10	200
Lock dues (only when docking)	0 06	120
Sweeping quay	0 01	20
Brokerage—		
50 c. per ton for first 600 tons cargo }	..	1,010
40 c. per ton from 601 tons to 1,000 tons }		
25 c. per ton from 1,001 tons upwards }		
Total	..	5,450
Exchange at 25 fr. to the £. equals	..	218½.

The compulsory port charges are at the rates per net register ton as given above on all vessels (except Italian) entering loaded from Ocean voyages, but those coming from European, Mediterranean, or Black Sea ports enjoy a reduction of one-half in the navigation dues, and one-third in the sanitary tax.

No navigation or sanitary dues are paid at Dunkirk when the vessel has left part of her cargo at a prior French port and paid them there, and if the municipal and tonnage taxes (or similar dues) have been paid at the prior French port, those payable at Dunkirk are reduced one-half.

Brokerage
tariff.

Brokerage, which at Dunkirk was formerly levied by a percentage on the freight, is now charged on the weight of the cargo; the ton of cargo, being calculated in accordance with an authorised tonnage scale, varies in weight from 200 kilos. up to 1,000 kilos., according to the merchandise. On cargoes not weighing more than 600 tons (calculated by the tonnage scale) the brokerage is from 15 c. to 50 c. per ton, any portion of the cargo exceeding 600 tons and under 1,000 tons, pays from 10 c. to 40 c. per ton, and on all cargo that exceeds 1,000 tons, the tariff is from 5 c. to 25 c. per ton. The variation in the scale of fees is according to the nature of the cargo, nitrate of soda, for instance, being one of the cargoes subject to the highest scale of fees, and coal one of those subject to the lowest. Brokerage is levied in a similar manner at Calais, Boulogne, and Havre.

Italian
vessels

Italian vessels, since the termination of the treaty of commerce with France, are not assimilated to the French flag, and steamers have to pay 2 fr. per net register ton, irrespective of their port of loading for navigation dues, and 50 per cent. more pilotage. Thus an Italian steamer of similar tonnage (2,000 tons net) to the one mentioned above would pay additional compulsory port charges amounting to 88*l.*, making a total with brokerage of 306*l.* The navigation dues on Italian sailing vessels are 1 fr. 60 c. per ton from all countries, the extra pilotage being the same as for steamers.

Public Works.

New east
pier.

The work of laying the foundations of the new east pier at the harbour entrance has been completed, but the masonry is not yet finished up to its proper height. The woodwork will be commenced this summer, and the pier completed in 1895. It is hoped the old east pier will be removed and the necessary dredging done, so that the enlarged entrance to the port may be opened to shipping in 1896. The width at the east pier head will be 131 yards (120 metres), and abreast the lighthouse 218 yards (200 metres), and the depth of water 22 feet 9½ inches (7 metres) at high-water neaps, and 27 feet 8½ inches (8 metres 50 centimetres) at high-water springs. It is proposed when the new lock is opened to further deepen the channel by dredging it as deep as the requirements of navigation may demand, and so far as the available resources may allow.

Future width
between
entrance piers.

North lock.

The large new entrance lock (near the lighthouse) to the Bassins Freycinet is to be ready at the same time. Its sills will give a depth of 29 feet 6 inches (9 metres) of water at the lowest neaps, and 34 feet 4 inches (10 metres 50 centimetres) at the lowest springs.

When these two important works are opened to shipping Dunkirk will be able to receive the largest merchant vessels, and there is little doubt that such a vast improvement to the harbour will give a large impetus to the trade of the port.

A Government surveying vessel, the "Chimère," is now (May) engaged in surveying the coast from Gravelines to the Belgian frontier. The last Government survey was made in 1879. Survey of coast.

British Seamen.

As anticipated in last year's report there was again a falling-off in the number of seamen discharged at this port, and, consequently, in the money orders issued. The reduction in the number of seamen discharged was 903; in wages paid in cash, 21,876*l.* 1*s.* 7*d.*; and in money orders, 8,434*l.* 19*s.* 7*d.* British seamen.

The much smaller importation of wheat and nitrate of soda was the reason of the falling-off in the number of seamen discharged at this port, and as the prospects of the French harvests are good, no increase can be reckoned on this year.

In 1893 the number of seamen engaged was 1,260 (decrease 719); discharged, 1,837 (decrease 903); deserted, 35 (increase 6); total, 3,132, a decrease of 1,616 compared with the year 1892.

The following table gives particulars of seamen discharged, wages paid, and money orders remitted to the United Kingdom during the past 10 years:—

Year.	Number of Seamen Discharged.	Wages Paid.		Money Orders Issued.	
		In Cash.	Bills on Owners.	Number.	Amount.
		£ s. d.	£ s. d.		£ s. d.
1884	1,636	26,483 14 10	415 0 6	800	12,560 13 11
1885	1,338	19,718 2 2	294 0 0	604	8,093 6 1
1886	1,443	19,765 7 1	402 14 4	589	8,373 12 9
1887	1,301	21,882 1 1	311 12 7	631	9,481 9 10
1888	2,079	36,967 7 7	499 2 11	1,078	18,498 15 4
1889	2,002	34,565 17 3	657 19 3	911	16,056 11 6
1890	2,146	36,729 6 5	590 13 10	981	15,516 1 6
1891	3,075	58,927 6 8	880 12 10	1,460	27,262 1 2
1892	2,740	53,013 7 10	1,265 3 6	1,163	21,806 0 0
1893	1,837	31,137 6 3	1,530 14 10	767	13,371 0 5

During the year 1893 the amount of money sent home through the consulate, in proportion to the wages paid to seamen in cash when discharged, was 42·09 per cent., against 41·13 per cent. in 1892, and 46·26 per cent. in 1891. Percentage of money sent home.

Upwards of 160 seamen were discharged in a penniless condition. These men or their boarding-masters had received large advances in the United States, and were most of them in debt to their ships when discharged at this port.

The continental transmission of wages scheme, which was recommended by a committee (appointed by the Board of Trade) in February, 1893, to be tried at Dunkirk has not yet been put in operation. Transmission of wages system.

It is to be regretted that nothing has been done to carry out the recommendation of the committee, for seamen are constantly asking if the Board of Trade is not at Dunkirk, meaning an officer who would allow them to go home as soon as their services finish on board ship without having to wait for their money. Many of the men express great disappointment, as they have seen in different newspapers that the scheme was in full operation at this port.

Every facility is given at home to seamen to save and remit their money, but how much more necessary it is they should be offered, if possible, even more facilities and inducements on the Continent to forward their wages to the United Kingdom. Such a very little thing appears to turn many a sailor from doing what is best for himself and his family when he is among the tempters, but if he is reached before these sharks can get at him he is altogether different and full of good resolutions, which he fully intends to carry out, and which in most instances he would carry out if the transmission of wages scheme was offered to him.

Improvement.

There is, no doubt, great improvement in all classes of the mercantile marine, but one great fault of the sailor, a fault which seems almost ineradicable, is the neglect to provide for a rainy day. Now, out of such wages as 3*l.* to 4*l.* per month, with no expenses for food and lodging, a considerable sum could, and ought to be saved yearly, sufficient to make a man independent in his old age, but as this too often is neglected seamen should be compelled to provide for themselves by a system of compulsory insurance.

Compulsory insurance and continuous discharges.

As stated frequently in my reports, compulsory insurance, coupled with continuous discharges, would do much to raise the morale of the sailor.

In consequence of the smaller number of seamen discharged, only 362 railway warrants were issued at the consulate.

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AND FINANCE.

FRANCE.

REPORT FOR THE YEARS 1893-94

ON THE

TRADE, &c., OF NICE.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1198.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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FRANCE.

NICE.

Consul Harris to the Earl of Kimberley.

My Lord,

Nice, June 4, 1894.

IN consequence of the trouble I have experienced in collecting the necessary statistics, I have been unable to forward my enclosed Commercial Report for the year 1893 until the present date. As in previous years, I have thought it best to include in this Report the entire season 1893-94.

I have, &c.

(Signed) J. C. HARRIS.

Report on the Trade and Commerce of Nice for the Years 1893-94.

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The season.

The season commenced late this year, as it usually does now-a-days : people avoiding coming southwards until the winter is well advanced, either because they require to curtail their holiday for reasons of economy, or else that they wait to be driven away by severe weather at home. A very large number of visitors flocked here, however, for the carnival festivities, and on a single day in the carnival week the tickets taken at the Nice railway station reached, I am told, the large number of 22,500, whilst our climate did its very best to retain them by securing for them continued fine weather without hardly a break or a drop of rain from February 2 until April 16.

Additional
hotel accom-
modation.
The Riviera
Palace.

A great addition was this season made to our hotel accommodation in the shape of the Riviera Palace Hotel, situated on the slope of the Cimiez hill, whence it enjoys a very good prospect, and which almost deserves its somewhat high sounding appellation, possessing a grand entrance hall fitted up with small tables and comfortable wicker chairs, to which non-residents are admitted for afternoon tea, and for the purpose of listening to the strains of a capital band hidden away among plants far away through a vista of columns. The prices of this establishment have, however, been complained of with some reason, and it is to be hoped that the Sleeping Car Company, which has hired the building and is managing this establishment, may see its way to adopting more moderate figures in the future.

Hotel de
Montboron.

Another addition is the Hotel de Montboron, which is of far more modest dimensions than the Riviera Palace, but which enjoys a far finer prospect, over-looking, as it does, the beautiful Bay of Nice, with the Esterel and Grasse mountains as a setting.

Hotel St.
Barthélemy.

A third hotel, which is situated well out into the country, is the Hotel St Barthélemy, the old Villa Arson, with the great attraction of its fine old Italian garden. This last hotel is not new, but is now managed by an English lady, and has been well filled during the entire winter, owing to the more moderate price of the accommodation ; this circumstance seems to prove what I stated in my last report, that the high prices of our hotels are one of the main causes of the shortness of our seasons. These out-lying hotels all possess breaks or small omnibuses, which run backwards and forwards two or three times a-day to the central quarters of Nice.

The regatta week has been exceptionally brilliant this year, owing to the presence of H.R.H. the Prince of Wales and his beautiful yacht "Britannia," which carried off no less than seven prizes during his stay on the Riviera. It is to be hoped that His Royal Highness's example may be followed, and that we shall see some cutters here next year more worthy to cope with the "Britannia" than the old "Walkyrie" and the "Deerhound," now "Oretta." If it be true that Mr. Gordon Bennett has promised 2,000% in prizes—1,000% for sailing races, and the other for steamboat races—a great impulse will be given next year to this attractive form of sport, which, taking place at the end of March and the beginning of April, tends materially to prolong our season; and although steamboat racing appears to be a singularly dangerous and uninteresting pastime, it has at all events the merit of attracting the multitude, who do not understand the niceties of sailing.

The regatta.
The Prince
of Wales'
successes.

The health of Nice has been good throughout the entire winter—so good, indeed, that during the first part of the season the doctors found but little to do. A mild form of influenza, however, appeared shortly after the beginning of the year, and has given them plenty of work.

Health and
mortality.

The mortality, calculated for the whole winter season, gives a percentage of 22·5 per 1,000 on a population of 97,000 and odd. The last census was, however, taken on April 12, when many strangers had departed, and it is therefore likely that this percentage is somewhat too high as regards the period comprised in the winter season, and that it might be calculated more correctly if taken on a population somewhat exceeding 100,000. At the same time, as the population drops considerably below the winter figures during summer, I fancy the percentage above given will be found to be tolerably correct, if considered as applying to the whole year.

When compared with other years, we find this average mortality decidedly lower than any as yet reported by me, the mortality of Nice having progressively fallen from 30·6 per 1,000 in 1887, to 23·09 per 1,000 in 1891, and, as above mentioned, to 22·5 per 1,000 in 1893.

The improved drainage of Nice has been referred to in several previous reports, and is mainly to be credited with the reduced mortality. The system is still incomplete however, the construction of drains, according to the new system adopted by the Municipality, or rather by the Commission, which sat in 1891, and which divided the town into sections, one to be taken at a time, having to be suspended during the winter season in order to avoid annoyance to our season visitors. Much has already been done, as I have previously reported, and the work is being steadily, if somewhat slowly, carried out to completion.

Drainage.

The system adopted is the "Tout à l'Egout," as it is called, or, everything to the drain. This system has been much attacked during the year that has gone by, but in these parts an opinion is rarely expressed which is founded on the sole merits of the case,

The Tout à
l'Egout
system.

and has generally to be accepted "cum grano," local politics being generally responsible for the greater portion. It is thus that one local print which is well known to be adverse to the present municipality, inveighed stoutly against the Tout à l'Egout system and the discharge of drainage and surface water alike into the deep sea by means of iron pipes laid along the bottom, as described in my report for 1891. This paper went so far as to state that if this system were to be thoroughly carried out, the "Baie des Anges," as the Bay of Nice is called, would soon deserve the title of "Baie des Vidanges" or Drainage Bay. Its arguments, however, such as they were, were only too easily refuted, the facts of the case being that, as related by me in my report for 1891, the iron pipes at present discharging drainage, surface water, &c., into the sea at a distance of 260 feet from the shore, and at a depth of 40 feet, convey nothing that is not already enormously diluted by the 2,000 gallons to 2,500 gallons of water discharged every 2 hours through the 80 automatic flushers already established, and that no smell or noxious vapour of any sort or kind is perceptible even when the observer is placed in a boat over the orifice of these pipes, as was proved by two medical men, an Englishman and an American, who took a boat and themselves tried the experiment.

The Hermite
system.

Mr. Hermite, the inventor of a system for the destruction of microbes and noxious gases in the drains themselves by means of the action of electricity, has been allowed a trial by the municipality, but the result has not so far been made public. This process professedly supplies a powerful disinfecting agent in a liquid form, obtained so far as I understand by the electrolisation of seawater, together with the admixture of chloride of sodium and chloride of magnesium in a special machine named the electroliser. It is to be feared, however, that this system, even if proved efficient, will be found too expensive for general application. Our municipality, nevertheless, deserves credit for keeping its eyes open to any professed improvements in sanitation, and for voting the money for carrying out the needful experiments.

The harbour
improvement.

Much controversy has been going on with regard to the plan I have previously adverted to for the improvement and so-called enlargement of the harbour of Nice, involving the demolition of one of the only two warehouses standing on our quays, and this at a time when more are urgently needed, as is proved by a decree of the Prefect ordering the prompt removal of the mass of goods constantly encumbering the quays, which decree is likely to remain a dead letter for want of warehouse room. Moreover, the destruction of the portion of projecting quay on which the said warehouse now stands would materially reduce the already lamentably deficient amount of quay frontage. I have shown in a previous report that the projecting quay in question affords frontage sufficient for three vessels to discharge simultaneously, whilst its removal will leave space for only one of them, and that the trifling increase of the water space obtained thereby would be quite insufficient to secure what its promoters claim for it, viz., facility of evolution for large vessels, which is now, and will remain for the

future, absolutely impossible in so contracted a harbour as ours. This controversy has been going on the whole winter, and has occasionally assumed a character of recrimination and personality which would have been better avoided, nor have the attacks in question prevented the company owning the warehouse, the Chamber of Commerce, and the Administration of Ponts et Chaussées, which in France have charge of the harbours, from coming to terms with one another and with the municipality, and unless the Government represented by the Prefecture, should see the matter in a different light, and should put a stop to a plan which appears to be absolutely indefensible on its merits, a comparatively large sum of money will be simply wasted, which would have been far better employed in real improvements, such as the deepening of the entrance, and the prolongation of an already existing jetty for the gradual formation of an outer harbour. With regard to the first improvement, the dredging of the entrance and of various portions of the present harbour to a uniform depth of 7 metres, is a matter of prime necessity, vessels being often delayed from inability to enter, as instances of which I may mention the steamer "Henry," which last summer came to load with olive oil for St. Petersburg, and had to lie outside and have her cargo brought alongside by means of lighters, owing to her drawing 21 feet, and the French steamer "Océan," of 3,000 tons burthen, with iron for Nice, and other goods for Marseilles, which was more recently obliged to put back and unload first at Marseilles, in order to lighten her sufficiently to enable her to enter the Port of Nice.

Controversy
on this
subject.

The formation of an outer harbour is also a matter of extreme necessity if the larger class of steam yachts so numerous now-a-days is to be provided for ; and this is a question of deep interest to the town of Nice, as these vessels and their owners leave large sums of money behind them. Several of the latter, such as Mr. Gordon Bennett, Baron Rothschild, and Mr. Kousnetzoff, whose vessels used to spend a good portion of each winter in Nice harbour, now prefer Mentone, Villafranca, or Cannes, in consequence of the space available for yachts at the bottom of Nice harbour being too contracted, and causing them to be crowded up like herrings in a barrel, while the narrow entrance obliged most of these large vessels to be towed in stern foremost, as well as to warp themselves out with difficulty ; moreover, Cannes is now engaged enlarging her own harbour, and unless something be done very soon, Nice will lose her preeminence in respect of affording an attraction to large yachts, a preeminence which she could easily keep by timely action ; whilst the provoking part of the matter is that the money which, if immediately expended on the jetty I have mentioned, would afford convenient shelter to several of these large yachts, is going to be frittered away in insignificant improvements in the interior of the harbour itself, and by far the greater portion is to go to indemnify the Société des Grains for the loss of the warehouse which is to be pulled down for no valid reason whatever.

Necessity of
an outer
harbour.

The sum voted by the municipality as a subvention towards
(1798)

A 4

Sums voted
for improve-
ments.

Cost of outer
harbour.

these improvements, which are estimated to cost 576,000 fr., amounts to 150,000 fr.; to this sum has to be added, however, a further sum of 350,000 fr. to indemnify the Société de Grains above mentioned, making altogether 926,000 fr. or nearly 1,000,000 fr. Not only would this sum, as stated above, suffice to provide us with an outer harbour by the prolongation of the jetty I have spoken above, but it has been computed on good authority that the construction of a far more considerable outer harbour or "avant port" worthy of Nice would not cost more than three times that sum, or more exactly 2,700,000 fr., including the prolongation of the present breakwater by 300 metres, which does not form part of the more modest plan I have sketched out above. The figures on which the calculation is based have appeared in a local paper, and are stated to have been supplied by qualified engineers, and they have moreover remained uncontradicted by the advocates of the plan of spending money without any return. They include no less a sum than 2,100,000 fr. for the prolongation of the large breakwater, and only 100,000 fr. for that of the jetty, which if itself considerably further prolonged would, in my opinion, render the laying out of the much larger sum on the breakwater unnecessary for the present, and would, as above stated, with a little dredging and other small improvements, supply us at once with an "avant port" capable of receiving several large yachts and other vessels of large tonnage. The enclosed sketch plan will illustrate and explain the different points involved.

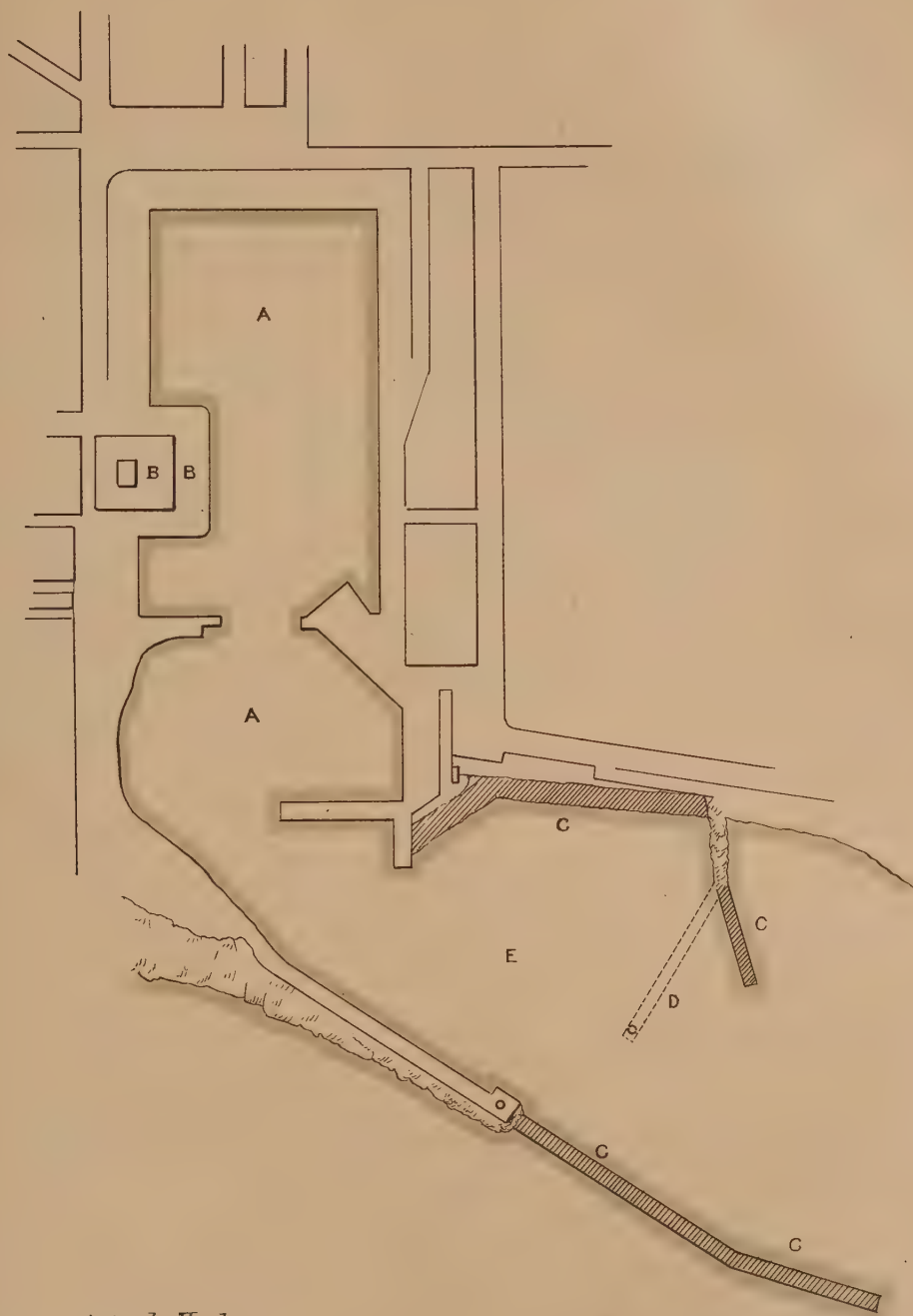
Electric
lighting.

The lighting of Nice by electricity is, to a certain extent, at last an accomplished fact, and although it is restricted for the present to the Place Masséna, Avenue de la Gare and adjacent streets, there is no doubt that the spread of the system is nothing more now than a question of time. The long delay in adopting the new method of lighting has been owing to the practical monopoly enjoyed by the Gas Company, their contract containing a clause to the effect that if at any time a new mode of lighting should appear desirable, the said Company should have the first offer of establishing it. I was myself, 3 years ago, the means of conveying to the municipality the offers of an English Company, but without any result, whilst the unwillingness of our Gas Company to incur the expense of new plant, &c., and the difficulty experienced by the municipality of arriving at an understanding with them, has left us far behind other towns of less magnitude in this respect.

Tendency to
the establish-
ment of
monopolies.

It is indeed curious how everything tends to the establishing of monopolies in these parts, to the singular damage of the long-suffering public. As an instance of this I would mention that our cabmen, who are with some exceptions as insolent and extortionate as they well can be, and possess a local trades' union, organised a manifestation in consequence of a Swiss Company, the Société Genevoise, having established an omnibus service to and from the Main Railway Station. The cabmen contended that this was a disloyal competition, and the omnibuses were forbidden to ply. Another so-called disloyal competition was indulged in by

SKETCH PLAN.



A.A. — *Actual Harbour.*

B.B. — *Warehouse and quay to be removed.*

C.C.C.C. — *Improvements suggested according to plan above mentioned and costing at least 2½ to 3 millions of francs.*

D. — *Improvements suggested by me costing less than one million francs and nevertheless forming E.*

E. — *Outer harbour.*

Messrs. Thomas Cook and Son. This celebrated agency, which has an office in Nice, decided to assist strangers to visit the neighbourhood by organising drives to Mentone by the upper Corniche, returning through Monte Carlo by the lower road and to any other place strangers might wish to visit. The plan, as advertised, was that whenever a sufficient number of persons inscribed themselves on the previous evening, a brake should be hired for them and should be found awaiting them at the office at a fixed hour the next morning.

Messrs.
Thomas Cook
and Sons'
excursions.

The cabmen, however, did not like the plan, which did not suit their views, and in consequence of their complaints, Messrs. Cook's representative was called upon to explain the matter to the Mayor. The latter declared that Messrs. Cook had a perfect right to do what they were doing, but nevertheless the Agency were summoned and fined, the prosecution being conducted by the Commissary of Police himself, on the ground that Messrs. Cook had organised a service of public carriages with a fixed destination, without complying with Art. 17 of the Decree of August 10, 1852, by which public conveyances are required to be registered and restricted to carrying a fixed number of passengers. Now these carriages had not a fixed destination, nor did they belong to the Agency, but being hired by them from a jobmaster, it appeared obvious that it was for the latter to comply with the above regulations with which Messrs. Cook had nothing to do, and yet the jobmaster in question was not included in the prosecution.

My intervention having been requested by Messrs. Cook, a "modus vivendi" was at length arrived at, but the strong pressure exercised in this vexatious case by the cabmen, who want to convert their trade into a monopoly, has now been turned in another direction, and they have addressed a petition to the Members of Parliament for the district, in which their right to a monopoly is treated as a self-evident proposition, whilst under the system of universal suffrage, they being all electors, the pressure thus exercised by their union on the representatives is not to be despised.

It never seems to be considered here that the more difficulties are placed in the way of strangers, the less are they likely to come to the Riviera; already the necessity of registering and paying a tax on all foreign servants they bring with them, and that on each successive visit, and even on each change of residence within French territory, has caused wide discontent, entailing as it does the incurring of the penalties of the law in case of non-fulfilment of the regulations; but a recent judicial decision renders this law still more stringent and irksome, for immatriculation is now declared to be imperative even in the case of occasional servants engaged on the spot, say, for example, a charwoman to come once a week, and who might be presumed to be a native of the place she is engaged in. Moreover, the spy fever has reached a point never before heard of, and I have it on unimpeachable authority that two Italian merchants residing in Nice were taken into custody quite recently by a squad of soldiers, accompanied by an

Difficulties
placed in the
way of
strangers.

officer, on a public road close to the octroi boundary, merely because they had been seen several times near the same spot. On producing their papers at the Etat Major de la Place they were at once released, but it is evident that if visitors are to be exposed to be marched through the town under arrest for taking a walk in the immediate neighbourhood, they will conclude they had better go elsewhere.

Personally, however, I have experienced nothing but the most perfect courtesy from the military authorities here, and I would therefore suggest that all our male visitors, without exception, should arm themselves with a passport before coming abroad, or else, on producing a proper introduction certifying to their respectability, apply for one from myself, when I feel sure they would have nothing to fear. A letter of introduction to myself would also be of great use to those among them who desire to be placed on the visitors' list of the Préfecture, the Préfet naturally requiring that I should be able to vouch for the respectability of all the persons I present.

Covering over
of the Paillon
torrent.

I mentioned in my last report that the Paillon torrent, which flows through Nice, was in process of being covered over by means of a continuous bridge from the Casino on the Place Masséna to the sea. This great work has been fully completed within the year, and the new gardens formed on this newly-acquired space were opened to the public in January. This is an enormous improvement and addition to the beauty of the town of Nice, and the grass lawns extending westwards from the Place Masséna form a delightful vista terminating in the line of blue sea beyond. It is much to be desired that this broad open expanse and the view it commands will not be much interfered with by the planting of trees, which, indeed, could not grow there in any luxuriance owing to the very few feet of soil intervening between the surface and the underlying arches, but which would, nevertheless, impede the view.

Destruction
of trees.

It is much to be regretted that the municipal engineer should have thought it necessary to complete the laying-out of these gardens by cutting a broad avenue through the old Jardin Public, destroying its fountain and old pepper trees, &c., and this for no discoverable reason except to come out opposite that very ugly building the Jetée Promenade, or Promenade pier. It is said that even the handsome row of palm trees on the Quai Masséna is menaced, as also the eucalyptus on the square of the same name, which, being our single really large tree, is the pride of the city. This tree was stated to be doomed two years since, and a veritable gum-tree question arose among us. Petitions for its preservation were started, and the name of the late Reigning Duke of Saxe-Coburg appeared at the head of the one most numerously signed by foreign visitors, in answer to which the Mayor gave assurance in writing that there was no question of destroying the tree. An ingenious "plebiscitum," or public voting, was on this occasion started by one of the local papers: two small oblong squares were left in blank for many successive days in one of its columns,

the one having "Oui" printed in the centre, the other "Non." One of these little squares was to be detached and deposited, according to the reader's opinion on the question, in the letter-box at the office of the paper. The result was an overwhelming majority in favour of the retention of the tree.

The proposal of a steam tramway to Cimiez appears to have died a natural death, for we have heard no more of it. The one projected by the existing horse tramway company between Nice and Monte Carlo was, as I stated in my last report, much opposed by the Paris, Lyons, and Mediterranean Railway Company. The latter, moreover, proceeded during the last season to show in a thoroughly practical manner that such a tramway was in no way necessary, by greatly accelerating as well as multiplying its own trains between the two places, so that not much more than 15 minutes' interval should occur between any two of them. The success of this improvement, which was a remarkable one, was rendered possible by the fact that the double line had been completed in good time before the commencement of the season. This new departure must also have been a financial success for the company, for the trains were one and all crammed, many passengers having to stand in the couloir or passage now adopted at one side of each first and second-class carriage. Steam tramways.

This is the only progress to be recorded this year in my districts with regard to railway communication, with the single exception of the short mountain line between Monaco and Turbie constructed on the principle of some of the Swiss lines of the same kind. Railways.

In comparing the statistics furnished me this year with those of the previous year, it will appear that there is a further falling-off in the total number of vessels visiting this port, though not in the tonnage, which proves that the "cabotage," or coasting trade, is more and more being transferred from small sailing vessels to steamers. This is most noticeable among French shipping, in which there is a reduction of but four steam vessels, while that among sailing vessels amounts to more than 100. There is also a further falling-off among Italian shipping, the only increase being in Austrian ships, a regular line of steamers now visiting this port every week. There is also a slight falling-off in British shipping, but this I hope will prove to be only accidental. Shipping statistics.

The octroi statistics, which this year I believe to be thoroughly reliable, having been furnished me by the courtesy of the Mayor himself, show a total of over 110,000*l.*, levied principally on wine, food, and fuel, amounting therefore to some 23*s.* per head of the population. This impost increases the price of every article of necessity to the very poorest as well as to the richest consumer, and it is curious that in spite of the municipal statistics just published, showing an excess of income over expenditure of over 10,000*l.*, almost wholly due to this impost, no thought of reducing the octroi dues appears to occur to anyone, while the chief sufferers are probably too ignorant to see why bread and wine, &c., are so dear, and consequently sit patiently under the infliction. Octroi statistics.

Training
school for
gardeners.

In concluding this report I desire to mention incidentally two matters which do not properly belong to trade. One is the fact that an Englishman of the name of Thornton has established in the immediate neighbourhood of Nice, and on property of which he has acquired the freehold, a training school for young gardeners, chiefly waifs and strays, who are trained in a thoroughly practical manner, and are kept under strict and almost military discipline. The education of the first batch of these will be completed next autumn, when occupation will be found for them, which will supply a want much felt in these parts, where no good native gardeners are available.

Prehistoric
find at
Mentone.

On January 12 a new skeleton was found in the quarries beyond Mentone. This pre-historic specimen of the Paleolithic age was found to measure 1 m. 984 mm., whereas the largest of the three found at the same spot in 1892 measured 2 m. 144 mm. These measures were arrived at by M. Rivière and others by careful measurement of the remains themselves, and they are now fully confirmed by means of a formula discovered by M. A. Mégrét, a sculptor of repute, who opines that it is the same as that used by the old Greek sculptors in modelling their statues, and consists of multiplying the length of the middle division of the middle finger taken inside the hand by 64. This formula, M. Mégrét assures, will be found to give the exact height of all normal human beings of either sex, to whatever age or race they may belong.

Annex A.—RETURN of all Shipping at the Port of Nice during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	24	35,672	24	35,672
French	163	11,296	460	91,000	623	102,296
German	143	14,997	7	367	150	15,364
Spanish	22	1,704	11	4,275	33	5,979
Greek	9	2,101	1	224	10	2,325
Norwegian	1	826	2	1,139	3	1,965
Swedish	...	...	...	...	...	...
Austrian	10	3,580	50	33,706	67	37,286
Turkish	5	821	...	...	5	821
Total	333	34,919	495	156,903	855	191,822
“ for the year preceding ...	464	36,365	486	149,499	945	186,304

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	...	...	24	25,672	24	25,672
French ...	163	11,230	400	91,000	563	102,230
Italian ...	119	12,831	10	2,453	129	15,284
Spanish ...	16	5,818	18	1,280	34	7,098
Greek ...	3	724	...	...	3	724
Norwegian ...	...	...	1	841	1	841
Swedish ...	2	1,430	2	1,430	4	2,860
Austrian ...	9	2,923	50	33,706	59	36,629
Turkish ...	...	...	5	737	5	737
Danish ...	...	...	1	627	1	627
Total ...	312	34,956	511	157,746	823	192,702
„ for the year preceding ...	480	39,166	484	149,261	964	188,427

RETURN of all Shipping at the Villafranca Roads during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	...	...	1	2,468	1	2,468
Italian ...	...	...	1	8	1	8
Total ...	...	...	2	2,476	2	2,476
„ for the year preceding ...	140	13,697	2	3,563	142	17,260

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	...	...	1	2,468	1	2,468
Italian ...	...	...	1	8	1	8
Total ...	...	...	2	2,476	2	2,476
„ for the year preceding ...	140	13,697	2	3,563	142	17,260

RETURN of Principal Articles of Import to Nice during the
Years 1893-92.

Articles.				1893.		1892.	
				Quantity.	Value.	Quantity.	Value.
					£		£
Coal	Tons ..			35,429	7,029	45,770	45,770
Charcoal	" ..			1,394	5,634	5,504	19,814
Marble	" ..			1,224	4,860	578	2,995
Timber	" ..			3,228	..	4,874	18,520
Cereals—							
Wheat	" ..			10,815	78,717	7,455	71,568
Oats	" ..			4,798	27,160		
Maize	" ..			877	3,287		
Flour	" ..			642	9,001	18,784	247,948
Beans and euros ..	" ..			5,154	20,840	14,458	52,048
Oil	" ..			5,660	251,756	13,435	364,488
Apples and pears ..	" ..			1,219	14,904	..	..
Wine	Gallons ..			2,626,537	94,752	6,105,440	266,419
Total	..			..	..	..	..

RETURN of Principal Articles of Export from Nice during the
Years 1893-92.

Articles.				1893.		1892.	
				Quantity.	Value.	Quantity.	Value.
					£		£
Olive oil	Tons ..			63	3,791	1,481	71,088
Coke	" ..			2,280	2,171	4,015	3,542
Cement and plaster ..	" ..			2,011	8,945	2,122	8,696
Glass and pottery ..	" ..			1,037	16,770	436	2,616
Empty casks	" ..			1,371	17,325	9,905	99,050
Maccaroni	" ..			5	103	19	320
Lemons and oranges	" ..			25	..	..	..
Refined sugar	" ..			4	155	..	..
Timber	" ..			1,277	41,302	..	..
Wine	Gallons ..			12,010	542	..	..
Various liquors	" ..			449	162	..	..
Tiles and bricks ..	Tons ..			437	2,210	..	..
Dried vegetables ..	" ..			4	82	..	..
Coal	" ..			967	1,535	..	..
Perfumery	" ..			34	55,490	..	..
Soap	" ..			20	592	..	..
Kitchen utensils ..	" ..			20	317	..	..
Other articles	" ..			1,200	..	..	..
Total	..			..	..	..	..

STATISTICS of the Octroi of Nice during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Tax Levied by Town.	Quantity.	Tax Levied by Town.
			£		£
Wines, spirits, beer, and lemonade...	Gallons ...	3,753,890	38,210	4,399,656	...
Vegetables and provisions	Tons ...	4,223	17,345	1,464	...
Fodder and cereals	" ...	21,638	6,107	11,264	...
Building materials	" ...	124,973	12,807	33,498	...
Timber and coal fuel	" ...	47,038	10,094	24,146	...
Meat, live animals	" ...	502	3,312	219	...
" dead animals	" ...	6,936	18,786	3,395	...
Other articles	" ...	1,374	3,865	1,334	...
Total	...	...	110,526	...	...

CANNES.

Mr. Vice-Consul Taylor reports as follows:—

I had to point out in my report of last year a considerable decrease in the figures of the imports as compared with those of 1891, which themselves showed a falling-off on the imports of 1890. I have now to record a remarkable increase for the year 1893.

The imports from all nations show an increase of 32,694*l.*, Commerce. being mainly from Algiers, Russia, and Turkey. From these three countries alone the increase is 31,224*l.*; while those from Great Britain show a slight falling-off, and a more important decrease is from Italy.

Trade in Cannes shows no improvement—to the contrary, it is Local even more unsatisfactory than last year. Visitors were later than industries. ever in arriving, and consequently some anxiety was caused, for up to the end of the year 1893 the hotels were comparatively empty, though now (middle of March) most of them are well filled, and things look more prosperous and encouraging, though it cannot be termed a good season.

The octroi returns for 1893 are practically the same as those of Octroi. 1892, the former being 32,931*l.*, and the latter 32,974*l.*—a very insignificant decrease.

Compulsory Registration of Foreigners.

The French Law of August 8, 1893, requires that every foreigner Registration not admitted to domicile arriving in a "commune" (district) to Law. exercise or carry on a profession, trade, or industry there, shall, within 8 days of his or her arrival, make a declaration of residence at the "Mairie," furnishing proof of his or her identity.

I must say that great facilities for accomplishing this registration have been given by the Mayor of Cannes and the Commissary of Police. I have ascertained that between 300 and 400 English have been registered, and the number, including all nations, amounts to very near upon 6,000.

I pointed out in my last report the non-success of the Casino des Fleurs; it has again been opened this season under new management, and everything is done to make it attractive, but it does not prove a prosperous undertaking.

Local im-
provements

The drainage works, which were suspended in October, 1892, for the winter season, were again resumed in June last, and over 2 miles were laid down during the summer, the work being again suspended at the end of October, 1893.

It is doubtful whether any of this work will be done in the summer of 1894, owing to the want of funds, and moreover there are other important and necessary improvements to be carried out. The principal object in the construction of the drains has been to get first at the outlying hotels and villas; but the town proper has scarcely been touched in the way of drainage.

I regret to say that no further progress has been made towards the realisation of the scheme for the new canal, which was to furnish a constant supply of drinking water, so as to avoid the interruption, as is the case with the present canal, in the month of October.

The same may be said of the scheme for providing new post and telegraph offices. No progress has been made in the matter, and the building has not been commenced.

The same, unfortunately, must also be reported concerning the new Commune College, though there is a prospect of this being begun this summer.

The construction of the new breakwater is progressing favourably, 400 of the blocks of masonry, weighing 42 tons each, have been built, and already 230 of them are immersed. I may remark here that 5 years were allowed for the completion of this important work; but even now it can be seen what an immense shelter this new breakwater will be to the harbour.

The telephone system is still increasing in its popularity, which is evidenced by the number of additional subscribers.

Electric lighting is being much more generally adopted, one of the latest innovations being the lighting of one of our English churches (Christ Church), for the purpose of having evening services.

Health.

The health of the district may be described as excellent, though in the month of January, 1894, there were a great many cases of influenza, when the death-rate was unusually high.

Consular
agents.

The following Powers, besides Great Britain, are represented by consular agents:—The United States of America, Italy, Denmark, Sweden and Norway, Belgium, Greece, Austria-Hungary, and Holland.

STATISTICS of the Octroi of Cannes during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Dues Levied.	Quantity.	Dues Levied.
Wines, spirits, beer, &c....	Gallons ...	1,283,675	£ 7,776	1,306,430	£ 7,746
Meat, cheese, and other provisions ...	Tons ...	3,065	13,454	3,049	13,394
Wood, fuel, coal, candles, &c. ...	" ...	18,513	2,917	20,093	3,058
Fodder and cereals ...	" ...	12,503	3,539	11,744	3,236
Building materials ...	" ...	62,222	3,909	72,868	4,179
Other articles ...	" ...	867	1,386	827	1,311
Total ...	...	...	32,931	...	32,974

TABLE showing Total Value of all Articles Exported from and Imported to Cannes from and to Foreign Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain ..	..	..	16,174	16,888
Algiers ..	..	..	25,518	7,826
Italy ..	982	1,560	2,359	4,056
Spain ..	..	..	1,525	46
Russia ..	..	..	26,865	18,012
Sweden ..	..	..	2,816	1,491
Austria ..	..	..	2,813	1,872
Turkey ..	116	..	7,379	2,564
Total ..	1,098	1,560	85,449	52,750

**Annex A.—RETURN of Principal Articles of Import at the Port of
Cannes during the Years 1893–92.**

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Meat, salted and preserved ...	Tons, cwts.	1-10	\$ 123	19-5	\$ 1,541
Cereals (wheat, barley, and oats, ground or not) ...	Tons	2,691	53,620	1,184	23,690
Cereals, other than the above ...	Tons, cwts.	12-19	309	6-7	152
Fruits, fresh and dried ...	"	17-4	1,376	11	879
Sugar, biscuits, syrup, coffee, and tea ...	"	4-16	764	8-17	1,415
Oil and essences ...	Cwts.	19	50	7-10	392
Timber, coke, and charcoal ...	Tons	2,519	8,061	1,784	5,709
Hemp, dressed ...	Tons, cwts.	6-10	104	4-4	67
Fodder, bran, and oil-cake ...	"	1-1	17	70-14	1,131
Marble, rough and worked ...	Tons	10,333	11,366	9,721	10,693
Coal ...	Tons	7-15	389	11-7	569
Soaps, candles, and spices ...	"	"	"	"	"
Wine ...	Gallons	52,818	5,765	38,074	4,108
Beer and spirits ...	"	2,246	612	1,940	497
Pottery and glass ...	Tons, cwts.	12-3	243	16-10	330
Fabrics, woven ...	Cwts.	7	162	1	20
Machinery, iron, and brasswork ...	Tons, cwts.	39-17	2,392	15	899
Furniture and woodwork ...	"	1-19	117	11-4	673
Carriages ...	"	"	"	"	"
Total ...	"	"	86,449	"	82,756

**RETURN of Principal Articles of Export at the Port of Cannes
during the Years 1893–92.**

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Glass, fine ...	Tons, cwts.	7-2	\$ 568	17	\$ 1,360
Spirits ...	"	"	"	"	"
Old iron ...	Tons, cwts.	81-14	414	15	120
Pottery, common ...	"	9-14	116	"	"
Deal boards ...	"	"	"	83	21
Spent flour, coal, and coke ...	Tons	"	"	2-18	59
Plants and trees ...	Tons, cwts.	"	"	"	"
Total ...	"	"	1,096	"	1,560

**Annex B.—RETURN of all Shipping at the Port of Cannes during
the Year 1893.**

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	...	...	6	4,715	6	4,715
Austrian ...	4	1,795	...	...	4	1,795
French ...	200	11,000	154	38,399	354	49,399
Italian ...	12	1,308	1	46	13	1,444
Greek ...	4	1,186	...	...	4	1,186
Norwegian ...	1	943	...	...	1	943
Russian ...	1	369	...	...	1	369
Turkish ...	1	60	...	...	1	60
Total ...	232	16,711	161	43,163	393	59,874
.. for the year preceding ...	218	11,523	178	45,350	396	57,073

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	6	4,718	6	4,718
Austrian	4	1,755	...	...	4	1,755
French	204	10,727	156	37,712	360	48,439
Italian	11	985	1	46	12	1,031
Greek	4	1,186	...	...	4	1,186
Norwegian	1	913	...	...	1	913
Russian	1	369	...	...	1	369
Turkish	1	60	...	...	1	60
Total	226	15,995	163	42,476	389	58,471
“ for the year preceding ...	217	12,140	177	45,581	394	57,671

MENTONE.

Mr. Vice-Consul Palmaro reports as follows:—

As stated in my former reports, Mentone has increased this season; and as regards our winter visitors, more than half are English.

Of English commerce there is little or none, the only regular import being English coal for the gas companies. Commerce.
Imports.

The total value of imports of all kinds (principally from France) is about 5,139*l*.

Exports amounted to 2,780*l*. Export.

The health of the district has been very good throughout the year, although the prevailing epidemic, influenza, has shown itself in a mild form. Health.

The visit of the Emperor and Empress of Austria and suite caused a great influx of visitors, making this season much better than the last. Visitors.

The ex-Empress Eugenie we count as one of our annual visitors, and her lovely villa draws many people to see its charming grounds.

Beside Great Britain, the following are represented by consular agents:—America, Italy, Russia, Austria, Belgium, Greece, Bulgaria, Hungary, and Holland. Powers
represented.

I herewith enclose the statistics of the imports and exports for the Port of Mentone. Shipping.

Annex A.—TABLE showing Quantity and Value of Articles Imported to the Port of Mentone during the Year 1893.

Articles.		Quantity.	Value.
			£
Olive oil.. ..	Tons ..	141	450
Wine (in barrels) ..	Hectolitres ..	20,000	400
Charcoal	Tons ..	174	43
Coal	" ..	3,000	2,400
Building materials ..	" ..	214	200
Hay	" ..	50	240
Linseed cakes	" ..	84	180
Marble	Kilos. ..	200	3
Maize	" ..	300	1
Common pottery	" ..	5,000	20
Empty casks	Tons ..	240	100
Cement, &c.	" ..	140	342
Flour	" ..	1,200	203
Rough forage (for cattle) ..	" ..	20	120
Bricks and tiles	" ..	310	400
Divers merchandise	" ..	93	32
Total			5,139

TABLE showing Quantity and Value of Articles Exported from the Port of Mentone during the Year 1893.

Articles.		Quantity.	Value.
			£
Olive oil.. ..	Tons ..	50	1,200
Wine (in barrel)	" ..	30	40
Coal	" ..	2	3
Building materials	" ..	105	160
Marble (already trimmed) ..	" ..	120	200
Common pottery	" ..	50	20
Empty casks	" ..	8	32
Iron metal (remnants) ..	" ..	17	40
Bricks and slates	" ..	16	48
Lemons	" ..	100	1,000
Divers merchandise	" ..	27	40
Total			2,783

Annex B.—RETURN of all Shipping at the Port of Mentone during the Year 1893.

ENTRED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	...	2	1,662	2	1,662
French	66 1*	3,129 49	51 ...	6,944	118	10,122
Italian	25 1*	872 69	5 13	128 51	44	1,100

* All cleared in ballast.

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	42	2,060	2	1,662	2*	1,662
French	23*	990	52	7,075	117	10,125
Italian ...	18	600	4	124	42	993
	6*	214	16	55		

* All cleared in ballast.

MONACO.

Mr. Vice-Consul Smith reports as follows:—

About 5,500 tons of English coal constitute the British imports into the principality of Monaco for the year 1893, the rest of the requirements of the principality are obtained mostly from French sources, and in a small degree from Italian. The exports are insignificant.

The public fine art gallery referred to in my last report has had a fair success, this year the exhibits are more numerous, there being 489, mostly by French artists, English artists being practically unrepresented. The names of Sir Frederick Leighton and E. Burne Jones have, however, been added to the committee. I am informed that many sales have been made.

The new mountain railway from Monte Carlo to La Turbie has been completed and opened, and is much appreciated as a means of excursion to many places of interest in the neighbourhood hitherto inaccessible.

The health of the principality has been good throughout the year; in the month of July a serious danger was averted by the prompt action of the Monegasque authorities: a few cases of cholera occurred in a colony of Italian work-people immediately on the frontier (French territory), the agglomeration of sheds occupied by these people being in a most deplorable condition, the authorities of Monaco obtained permission from the French authorities to interfere, and by their prompt and energetic action suppressed what undoubtedly would have been a serious outbreak.

Annex A.—RETURN of all Shipping at the Port of Monaco during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	5	4,022	5	4,022
French	53	2,477	10	220	63	2,697
Italian	17	1,201	...	...	17	1,201
Monaco	4	196	...	...	4	196
Total	74	3,874	15	4,242	89	8,116

CLEARED.*

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	5	...	5	...
French	53	...	10	...	63	...
Italian	17	...	...	...	17	...
Monaco	4	...	...	...	4	...
Total	74	...	15	...	89	...

* All cleared in ballast.

Annex B.—TABLE showing Quantity and Value of Articles Imported into the Principality of Monaco during the Year 1893.

Articles.	Quantity.	Value.
	Tons.	£
Sand	10,000	12,300
Building materials	27,000	40,000
Metal, worked	3,000	7,920
Timber for building	2,000	5,500
Marble, rough and wrought ..	7,000	12,500
Wines	2,500	9,000
Beers	2,000	2,750
Spirits	80	1,250
Flour	3,000	60,000
Provisions	3,500	50,000
Charcoal	3,500	10,000
Oats and fodder	8,000	23,000
Firewood	4,000	10,000
Building slate	800	7,000
Coal	5,500	5,000
Candles	60	3,500
Paper	30	1,200
Furniture	250	8,000
Other articles	1,500	9,000
Total	83,720	277,920

TABLE showing Quantity and Value of Articles Exported from the Principality of Monaco during the Year 1893.

Articles.					Quantity.	Value.
					Tons.	£
Empty casks	..	..	..	..	12	..
Wines	..	..	..	..	100	..
Perfumes	..	..	..	..	8	..
Coal tar	..	..	..	..	200	..
Old metal ware	..	..	..	..	15	..
Artistic pottery	..	..	..	..	3	..
Hides	..	..	..	..	80	..
Fatty matters	..	..	..	..	10	..
Other articles	..	..	..	..	120	..
Total	..	..	..	..	548	..

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1894.
ANNUAL SERIES.

No. 1441.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF TAHITI.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1210.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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[C. 7298—111.]

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FRANCE.

TAHITI.

Consul Hawes to the Earl of Kimberley.

My Lord, Tahiti, May 12, 1894.
I HAVE the honour to enclose my Report on the Trade and
Commerce of Tahiti for the year 1893.
I have, &c.
(Signed) A. G. S. HAWES.

Report on the Trade and Commerce of Tahiti for the Year 1893.

ABSTRACT of Contents.

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Shipping and Navigation.

RETURN of all Shipping at the Port of Papeete, Tahiti, during
the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	10	1,386	11	5,225	21	6,611
French	2	1,475	...	...	2	1,475
" coasters*	258	8,292	...	...	258	8,292
American	15	5,432	...	...	15	5,432
Danish	2	939	...	...	2	939
Norwegian	2	1,041	...	...	2	1,041

* In this number are included sloops and small cutters engaged merely in the local trade of the ports of Tahiti.
(1825) A 2

CLEARED.

Nationality	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	11	1,428	11	5,225	22	6,653
French	1	683	...	...	1	683
... .. steamers ...	252	7,606	...	...	252	7,606
American	15	5,492	...	...	15	5,492
Danish	2	959	...	...	2	959
Norwegian	1	498	...	...	1	498

Mail service
between Tahiti
and San
Francisco.

Mails are still carried between these ports by sailing vessels, which, however, now call again at the Marquesas on route here.

A line of steamers, monthly, to connect with the Sydney-San Francisco steamers at Samoa was lately proposed, but has been rejected by the Conseil-Général, as, in reality, it was only a passenger and mail service, transhipment of freight not being practical.

An inspector of the Messageries Maritimes Steamship Company has recently been here to examine into the feasibility of putting on a through line of steamers from Noumea to San Francisco calling at Tahiti and the Marquesas. The company is prepared to establish this line if the home Government in Paris will pay a large annual subsidy, some such figure as 3,000,000 fr. would be demanded, but at present it does not appear probable that any subsidy would be accorded.

Steam com-
munication
with
Auckland.

Steam communication with Auckland is still regularly maintained by the steamship "Richmond," belonging to the firm of Donald and Edenborough.

RETURN of Principal Articles of Export from Tahiti during the
Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
		£		£
Beche-de-mer	Lbs. ...	...	24,600	344
Coffee	...	34,000	1,610	76,000
Cotton	...	629,856	23,596	463,234
Dried coconut	...	31,550	637	34,865
For sugar	...	18,112	182	26,308
Vanilla	...	29,878	5,008	25,000
Cotton seed	Tons ...	...	343	146
Copra	...	2,875	33,314	4,275
Mother-of-pearl shell	...	566	68,124	993
Cocoanuts	Number ...	624,281	2,280	665,650
Oranges	...	4,054,080	2,304	2,884,080
Rubies	...	441	78	192
Lime juice	Gallons ...	9,000	400	...
Wax	...	...	...	100
Wood	...	...	...	1,738
Others	...	1,890	...	15
Total	...	120,296	...	128,240

Copra

Copra continues to be produced in about the same quantities as last year, 1892, although the return shows a decrease of over

1,000 tons, it should be remembered that a portion of the copra made in 1893 was shipped in the early part of this year and will be shown in the return for 1894.

Vanilla is decreasing somewhat on account of the very low prices paid here; the consequence of the lack of demand in the United States and Europe.

The result of the diving season at the Paumotus, now in full activity, without the means of the diving dress, shows that the assertions made as a reason for suppressing the diving apparatus (scaphandres), viz., that an injury was done by their operations to the production of the shell beds, were groundless, nay, more, it is practically proved that the scaphandres have actually increased the fertility and production of the shell banks. For there is a marked increase in the quality and quantity of the shells now raised by the naked divers in those islands which in 1890-91 were most thoroughly worked by the scaphandres.

The Gambier or Mangareva Group has produced this season some 100 tons of shell of a quality rather better than that of last, but still much inferior to the Paumotu black-edged shells.

Vanilla.

Shells of the
Paumotu
Group.Shells of the
Gambier
Group.

RETURN of Principal Articles of Import to Tahiti during the
Years 1892-93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
Livestock		...	£ 2,408	...	£ 416
Salt provisions		...	5,831	...	8,183
Flour	Lbs. ...	2,238,430	10,580	2,338,830	8,459
Rice	" ...	442,721	2,166	456,664	1,758
Peasants	" ...	392,399	2,374	361,840	1,970
Potatoes	" ...	227,741	381	192,733	390
Beans	" ...	39,292	194	60,737	390
Sugar—					
Refined	" ...	296,450	2,983	146,333	1,625
Brown	" ...	140,643	942	48,661	387
Tee	" ...	7,411	364	11,320	462
Coffee	" ...	48,485	1,364	860	31
Olive oil	Gallons ...	1,442	465	1,360	407
Vegetables	Lbs. ...	6,769	259	...	290
Onions	" ...	67,680	231	67,298	220
Wheat	" ...	38,688	161	48,127	137
Barley	" ...	331,368	748	321,149	623
Oats	" ...	...	5	...	...
Bran	" ...	68,160	110	62,293	87
Opium	" ...	318	234	993	765
Wine—					
Red, in cask	Gallons ...	12,497	764	34,110	1,426
" bottle	" ...	878	280	330	68
White, in cask	" ...	4,981	460	3,800	232
" bottle	" ...	407	120	516	100
Champagne	" ...	242	236	460	234
Abolthe	" ...	4,048	962	2,000	450
Vermouth	" ...	602	101	200	39
Gin	" ...	80	16	53	10
Rum	" ...	67	9	...	...
Whiskey	" ...	66	27	64	20
Beer	" ...	1,867	328	4,160	495
Bitters	" ...	140	50	85	55
Americleon	" ...	182	40	97	18
Liqueurs, assorted	" ...	902	345	630	260
Cognac	" ...	3,906	750	1,973	495
Other liquors	" ...	925	256	625	158
Vinegar	" ...	658	44	223	22
Mineral waters	Cases ...	11	19	...	162
Linseed oil	Gallons ...	3,014	238	...	163
Turpentine	" ...	1,413	465	147	17
Oils	" ...	...	85	...	53
Sweet biscuits	Lbs. ...	20,238	431	12,330	311
Coals	Tons ...	2,637	1,748	...	1,280
Bricks	Mil. ...	7	13	60	45
Cement	Lbs. ...	44,000	43	...	2,400
Iron	" ...	13,370	55	...	2,630
Timber	" ...	...	3,649	...	12
Hay	Lbs. ...	4,818	10	7,871	410
Drugs	" ...	...	364	...	632
Paints	Lbs. ...	65,084	848	51,068	2,168
Soap	" ...	445,178	2,361	358,611	230
Perfumery	" ...	...	824	...	642
Tobacco and cigars	" ...	...	976	...	720
Matches	Gross ...	8,300	748	9,810	503
Calico	Yards ...	177,016	1,760	200,614	3,715
Pareus	" ...	200,667	2,307	325,809	769
Denims	" ...	23,173	640	24,398	274
Silks	" ...	...	260	...	1,344
Muslins	" ...	103,090	1,219	118,551	8,600
Prints	" ...	362,624	4,676	331,758	4,140
Other cloths	" ...	...	10,784	...	1,942
Ships' stores	" ...	...	2,104	...	1,424
Kerosene	Gallons ...	46,600	1,784	39,045	47,729
Other articles	" ...	...	...	...	...
Total		...	75,469	...	106,266

Opium

The sale of opium has since the beginning of this year ceased to be farmed out by the Government, and is now carried on directly by the authorities as a Régie. This will certainly have

a good effect in preventing to some extent the contraband sale of the article.

In the Marquesas Group the sale of opium has been absolutely prohibited. This had become a measure of prime necessity, as the native population there were slaves to the habit, and used the drug to the greatest excess. But it is interesting to note, in view of the efforts now being made to control the use of opium in India and elsewhere, that since the suppression of the sale of opium in the Marquesas, the demand for ardent spirits has suddenly and rapidly increased in that group. The opium user was not as a rule a consumer of liquor. But of the two evils liquor was certainly the least in the Marquesas, for the opium habit there would in all probability have meant destruction to the race.

Sale prohibited in the Marquesas Group.

Demand for spirits.

The opium habit was acquired in the Marquesas during the past 15 years from the Chinese resident there. It is singular that in Tahiti, with a much larger Chinese population, the custom of using the drug has not spread to any serious extent amongst the natives.

Opium habit.

The protective duty of 25 centimes per kilo. on all imported sugar has had the effect of stimulating the production of that article here. There will be produced this year probably about 100 tons, which will still be considerably below the local demand.

Sugar.

Exchange.

The Chilean and Peruvian dollar continues to depreciate in value, but is yet far above the actual or bullion value, being still worth about 2s. 6d. per dol., whereas the actual bullion value is not more than 2s. sterling, if even so much.

The depreciation in the value of Chilean dollar.

The value of silver here is regulated principally by its cost in the French local paper currency, and the constant absorption of the silver by the natives, who hoard the dollars up, keeps the stock of dollars low and prevents their fall to their true value, which, however, must come sooner or later.

As the value of the dollar depreciates the price of goods necessarily rises in proportion, so that a balance is maintained in trade, for the same reason the prices of produce purchased in Chilean coin are augmenting, without, of course, benefit to the producer, who has to pay more for the goods he wants to buy, frequently, indeed, in greater proportion to the increased rates he gets for his shells, &c.

Agriculture.

Coffee is being planted by the natives to a small extent in Tahiti and Rurutu. It is to be hoped that this culture by native planters may be adopted instead of that of vanilla and cotton, for in the amount of coffee that could be produced by the natives on their own lands, we would have the solution of the difficulty so

Coffee.

long felt, viz., to find a profitable culture which could be carried on by the native and his family without expensive buildings or machinery.

Referring to the coffee plantation mentioned in my report for last year (Annual Series No. 1210) as worked on recognised principles of cultivation, I am informed by the owner that it is now in a most satisfactory condition, and indeed in advance of his expectations this time last year. He is of opinion there can be no question as to the culture of coffee being a financial success here, provided that approved methods of culture are pursued. He even states that his experience has proved that it is actually less costly in the end to prepare the ground properly at first by ploughing and to cultivate the plantation constantly with horse hoes, than to dig holes in the hard ground and to keep the weeds down afterwards by hand, even without considering the difference in results, which is beyond comparison.

Cotton.

Cotton is not a remunerative crop at the low prices ruling, and it would not pay to engage labour for its cultivation. Natives, however, who have small patches, to whom time is no consideration, continue still to work them.

Jute.

A species of jute producing a good fibre is very abundant in Tahiti. Efforts are now being made to get natives to prepare this article for the market. Samples sent to London have been valued at 14*l.* per ton.

Oils.

An important industry might be created here in the manufacture of oils from the candle nut ("*aleurites triloba*"), the ati or tamanu nut ("*calophyllum inophyllum*"), the castor oil nut ("*kicinus*"), and others.

The candle nut and the ati nut cost too much for freight if shipped in the form in which they fall from the tree. But, owing to the warmth of the climate, if the outside covering of the nut be rejected the kernel remains in a semi-liquid state and cannot be transported except in barrels or tanks. It would, therefore, clearly be more practical to press the kernels here and so manufacture the oil fit for the market, as barrels must be used in any case.

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ON THE

TRADE OF NEW CALEDONIA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1091.

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1349. Cherbourg	1d.	1407. Pa'hoi	1½d.
1350. Jerusalem	1d.	1408. Hankow	1d.
1351. Santiago	1d.	1409. Amsterdam	1d.
1352. San José	1d.	1410. Copenhagen	½d.
1353. Trieste	3½d.	1411. Damascus	1d.
1354. Madrid	2d.	1412. Chefoo	3d.
1355. Teneriffe	½d.	1413. Swatow	1d.
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1357. Paraguay	5d.	1415. Fiume	2d.
1358. Guayaquil	4½d.	1416. Athens	6d.
1359. Cadiz	1½d.	1417. Seoul	1½d.
1360. Marseilles	1½d.	1418. Beyrout	1d.
1361. Brest	1d.	1419. Berlin	1½d.
1362. Syra	2½d.	1420. Nice	3d.
1363. Suakin	1d.	1421. Yokohama	1½d.
1364. Callao	1d.	1422. Maracaibo	1½d.
1365. Piræus	2d.	1423. Tunis	1½d.
1366. Stettin	2d.	1424. Baghdad and Bussorah	1d.
1367. New Orleans	2½d.	1425. Rio Grande do Sul	7d.
1368. Angora	1d.	1426. Erzeroum	1d.
1369. Antwerp	2d.	1427. Christiania	5½d.
1370. Genoa	3½d.	1428. Charleston	3½d.
1371. Batoum	2d.	1429. Meshed	1d.
1372. Rouen	2½d.	1430. Copenhagen	½d.
1373. Santo Domingo	½d.	1431. Galveston	2½d.
1374. Nantes	1½d.	1432. Hamburg	2½d.
1375. Taganrog	2½d.	1433. Brindisi	2½d.
1376. Ispahan	4½d.	1434. Gothenburg	2d.
1377. Leghorn	2d.	1435. Kinnichow	1½d.
1378. Cagliari	1d.	1436. St. Petersburg	½d.
1379. Boston	1d.	1437. Malaga	1d.
1380. Palermo	3d.	1438. Chicago	2½d.
1381. New York	2d.	1439. Odessa	2d.
1382. Zanzibar	2d.	1440. Tabreez	1½d.
1383. Naples	1½d.	1441. Tahiti	2d.
1384. Constantinople	2d.	1442. Shanghai	2d.
1385. Buenos Ayres	5½d.	1443. Nagasaki	1d.
1386. Caracas	1½d.	1444. Madrid	2½d.
1387. Vienna	1½d.	1445. Malaga	2½d.
1388. Madeira	½d.	1446. Rotterdam	1d.
1389. Panama	1½d.	1447. Port Said	1½d.
1390. New Orleans	2½d.	1448. Sofia	2½d.
1391. Manila	2d.	1449. Warsaw	1½d.
1392. Foochow	1d.	1450. Africa (Congo)	2d.
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No. 1455.

Reference to previous Report, Annual Series No. 1091.

FRANCE.

NEW CALEDONIA.

Consul de Cœtlogon to the Earl of Kimberley.

My Lord,

New Caledonia, June 13, 1894.

I HAVE the honour to enclose a Trade Report for the year 1893. The long delay in publishing the statistics has prevented my forwarding the Report earlier.

I have, &c.

(Signed) H. DE CÔETLOGON.

Report on the Trade and Commerce of New Caledonia for the Year 1893.

ABSTRACT of Contents.

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General observations	1
Trade and commerce	1
Public works	2

The commercial movement of this colony, for 1893, shows a decrease on importations, and an increase on exportations, as compared with 1892. General remarks.

The principal cause of this decrease is the application to this colony of the new French Customs tariff, but slightly modified in its favour. Tariff.

The general tariff is applied with few exceptions.

The articles allowed to enter free are: live animals, salted and preserved meats, dried fish, grain and flour, fruit and vegetables, ordinary sugar, sugar, tea, American trade tobacco, timber, hops, coal, petroleum, cast-iron, copper, acids, salt, ropes, leather belting, agricultural instruments and tools, gunpowder, &c.

(1842)

A 2

Public Works.

Public works.

The public works of any consequence actually being carried on are the main roads of the colony, bridges, and the quay, of which there is now about 300 metres completed.

Smelting works for nickel and other ores are also shortly to be erected, but operations are not expected to begin before 1895.

GENERAL Value of Importation and Exportation for the
Year 1893.

	Value.		
	Francs	Francs.	Francs.
TRADE BETWEEN FRANCE AND NEW CALEDONIA.			
Importation from France to New Caledonia	..	5,267,974	
Exportation from New Caledonia to France	..	4,568,832	9,836,806
TRADE BETWEEN NEW CALEDONIA AND OTHER COUNTRIES.			
Importation of foreign goods	By French vessels—		
	From France	1,580,365	
	foreign countries	2,329,492	
	By foreign vessels	4,009,797	
Exportation to foreign countries	Colonial products	4,686,753	
	Imported goods	19,987	
		4,706,740	8,716,537
General total	..	..	18,553,343

NEW CALEDONIA.

3

COMPARATIVE State of Importation and Exportation during the Years 1892-93.

	First Quarter.		Second Quarter.		Third Quarter.		Fourth Quarter.		Total.	
	1892.	1893.	1892.	1893.	1892.	1893.	1892.	1893.	1892.	1893.
	Frans.	Frans.	Frans.	Frans.	Frans.	Frans.	Frans.	Frans.	Frans.	Frans.
IMPORTATION.										
French goods imported from France—										
By French vessels	1,066,525	1,481,768	1,261,224	1,823,471	1,467,295	1,123,346	1,689,919	1,319,169	5,485,023	5,253,754
By foreign vessels	143,235	14,220	...	...	8,920	...	122,257	...	268,012	14,220
French goods of foreign importation—										
By French vessels	253,246	330,452	364,894	374,210	466,316	327,436	674,143	598,237	1,658,599	1,680,305
By foreign vessels	1,126,263	790,721	1,713,177	466,964	1,718,233	766,976	2,296,347	304,801	6,854,020	2,329,492
Total	2,589,269	2,667,161	3,339,295	2,170,645	3,665,364	2,217,758	4,682,726	2,222,207	14,266,654	9,277,771
Difference for the year 1893 { Increase ...	...	77,892	...	...	...	...	...	...	...	...
Decrease ...	...	...	...	1,163,650	...	1,437,606	...	2,460,519	...	4,986,883
EXPORTATION.										
Colonial products	1,674,649	2,289,415	1,645,859	1,754,127	1,630,241	1,628,975	2,394,233	3,603,055	7,344,982	9,275,572
Difference for the year 1893 { Increase ...	...	614,766	...	108,268	...	...	...	1,208,822	...	1,930,590
Decrease ...	...	...	...	...	...	1,266	...	...	...	...

RETURN of Articles of Export at Noumea for the Year 1893.

Description of Goods.	Value
	Francs.
Groceries	239,858
Grain, vegetables, and fruit	333,245
Chemicals	213,990
	65,328
Divers produces	6,696
Animal products, preserved meats, wool, leather, &c.	1,333,316
Fishery products	61,923
Guns	6,473
Copper ore	2,580
Chrome ore	21,325
Cobalt ore	101,080
Nickel ore	6,241,912
Lead ore	94,300
Cobalt regulus	476,290
Old metals	31,784

RETURN of Articles of Import at Noumea for the Year 1893.

Description of Goods.	Value
	Francs.
Living animals	137,285
Groceries	517,690
Grain, vegetables, and fruit	275,923
Timber.. .. .	139,560
Coal and coke.. .. .	287,966
Arms and ammunitions	21,479
Chemicals	363,748
Wine and spirits	1,946,637
	120,829
Burning-oils and candles	121,984
Bricks, cement, and galvanised iron ..	86,798
Clothing	527,450
Tobacco and opium	129,966
Wheat, flour, and dried vegetables ..	1,007,282
Divers produces	2,547,487
Produces for consumption	852,693
Glassware and earthenware	67,833
Mineral waters	19,719
Printed matters	108,375
Divers articles	43,570

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AND FINANCE.

GERMANY.

PRELIMINARY REPORT FOR THE YEAR 1893

ON THE

TRADE OF STETTIN.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1297.

Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.

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1273. Buda-Pesth	½d.	1334. Bordeaux	2½d.
1274. New York	3d.	1335. Taganrog	1d.
1275. St. Petersburg	7½d.	1336. Galveston	8½d.
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1277. Tokio	2½d.	1338. Batavia	1½d.
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1287. Peking	½d.	1348. Amapala	1d.
1288. Amsterdam	1d.	1349. Cherbourg	1d.
1289. Manila	2½d.	1350. Jerusalem	1d.
1290. Bahia	1d.	1351. Santiago	1d.
1291. Munich	1d.	1352. San José	1d.
1292. Trieste	1½d.	1353. Trieste	3½d.
1293. Tunis	4d.	1354. Madrid	2d.
1294. Montevideo	1½d.	1355. Teneriffe	½d.
1295. Belgrade	2d.	1356. Havana	2d.
1296. Teneriffe	1d.	1357. Paraguay	5d.
1297. Stettin	3d.	1358. Guayaquil	4½d.
1298. Rome	2½d.	1359. Cadiz	1½d.
1299. Dantzig	7d.	1360. Marseilles	1½d.
1300. Sofia	2½d.	1361. Brest	1d.
1301. Mexico	1½d.	1362. Syra	2½d.
1302. Paris	1d.	1363. Suakin	1d.
1303. Buenos Ayres	½d.	1364. Callao	1d.
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No. 1366.

Reference to previous Report, Annual Series No. 1297.

GERMANY.

STETTIN.

Consul Powell to the Earl of Kimberley.

My Lord, *Stettin, April 13, 1894.*
 I HAVE the honour herewith to forward my Preliminary Report on the Province of Pomerania for the year 1893, pending the completion of my Annual Report for the same year.
 I have, &c.
 (Signed) **WILFRED POWELL,**

Preliminary Report on the Trade and Commerce of the Province of Pomerania for the Year 1893.

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Merchandise
Marks Act.

An amusing but significant incident has been brought to my notice in regard to the Merchandise Marks Act and its operation in Germany. It is a well-known fact accepted by all classes in Germany that English goods are supposed to be the best, and during the great feasts of Christmas and Easter thousands of country people flock to the cities to buy their presents and supplies for the coming holidays, these peasants know nothing of the English tongue, but seeing words in a foreign language stamped upon an article, they naturally ask what language it is, and are told by the seller, who probably is as ignorant as the purchaser in respect to the actual meaning of the words, that it is English, they eagerly buy it as such. Last summer this story was corroborated by myself, being at a farmhouse in the country, the good wife brought out her best china for coffee, and with great pride pointed out to me that it was English, alas, for her cherished English ware it bore the legend "Made in Germany."

Remarks on
trade circulars
and catalogues
for Germany.

This is not the only case of goods which are made in Germany being sold as English, indeed it is a well-known practice to label all manner of goods that are produced in Germany as purporting to be of British origin, and the practice does not seem to be at all on the decrease. In relation to this matter I would venture to point out that the large and beautifully got up circulars and catalogues from the United Kingdom of goods for sale with which, if I may judge by Stettin, British Consulates abroad are inundated, are practically useless to the purposes for which they are intended. There are constantly arriving catalogues

from British manufacturers beautifully printed and illustrated, which must have cost a large amount of money to produce, but which being entirely in English are of comparatively little or no value as extenders of trade. I would enquire how many business men in the United Kingdom have the leisure if they have the knowledge to wade through a catalogue extending often to many pages in (say) the German language, though it may be entirely upon the subject of a German business similar to their own and containing (possibly) much information. I think the number of such men is small, and that is decidedly the fact with regard to German business men; they cannot wade through an English catalogue full of technicalities however well got up, even if they are acquainted with the English language sufficiently to carry on a correspondence in it fairly well. What is wanted here is information on British trade, but in the German language, this no doubt is done by some firms in the United Kingdom but I think those who do so are in the minority.

In consequence of the Commercial Treaty between Germany and Austria (differentially operating against Russian trade with the former country), the German duties on grain from all countries with the exception of Roumania and Russia were on February 1, 1892, reduced from 50 marks to 35 marks per ton for wheat and rye, from 40 marks to 28 marks for oats, and from 22 marks 50 pf. to 20 marks for barley. Some months afterwards, the reduced duties were conceded to importations from Roumania, on the understanding that pending the negotiations for a Commercial Treaty, German goods were to be treated in Roumania on the most-favoured-nation footing. After a similar arrangement proposed by Russia had been declined by Germany, and after the lapse of nearly a year and a half, Russia resorted to reprisals by imposing differential duties varying from 10 per cent. to 30 per cent. on importations from Germany into Russia (proper), not including Finland which country has her own custom tariff. Germany replied at once by adding 50 per cent. to existing duties on Russian goods, and Russia as promptly raised her own tariff on German goods to 50 per cent., at the same time ordering Finland to do the same, also imposing tenfold harbour dues on German shipping trading to Russian ports. The effects of these measures on German trade in general and on Stettin in particular were these:—Since Russia resumed the exportation of grain in the autumn of 1892, it was found quite impossible to revert to the old position in Germany with regard to the import of Russian wheat, rye, and oats for home consumption; such supplies as Germany required, and which owing to two exceptionally large home crops were much larger than usual, she had with ease and cheapness obtained from other sources; from whence she could have easily been supplied with almost any amount required, the deficiencies in those countries being replaced by Russian grain for their own consumption. (Rye, of which Germany used to require an average importation of 600,000 tons, is duty free in Denmark, the Netherlands, Belgium, and Roumania, the average rye production of these countries is (1732)

The Russian
German
tariff war.

estimated at 1,500,000 tons yearly). Such Russian grain (wheat and rye) as has come to Germany since the autumn of 1892 has been imported duty free by flour mills in exchange for flour exported by them.

On the other hand, the smallness of the differential duty on barley, and the large German demand for feeding-stuffs enabled this country to draw from Russia considerable supplies of that article until this importation was stopped by the additional 50 per cent. duty. Of course Russia has since found other markets for the barley which Germany has ceased to import from her, and Roumanian feeding barley, which under former circumstances would have been sold to England, now fills up the gap in the German import of that article. In short, the German differential duties on grain cannot have altered anywhere the relations between supply and demand, and whatever direct loss they have caused either to Germany or Russia has been insignificant.

The case is, however, different with regard to German manufactured goods. The goods excluded from the Russian market, and for which Germany has not been able to find other buyers elsewhere, must have proved a serious loss on the German side.

In 1891-92 German exports to Russia were valued at about 8,000,000*l.* per annum, including those to Finland, which may be computed at 2,000,000*l.* During the first 7 months (January to July) of 1893 Germany exported of iron and steel 54,000 tons to Russia, in the 5 following months, 13,000 tons; of machinery for the corresponding periods the amounts are 8,400 tons and 4,200 tons.

The Stettin manufactories have been principally affected by the closing of the Finnish market, which had been a regular customer for chemicals and refined sugar. On an average of late years the Stettin sugar refinery sold to Finland about 4,800 tons of refined sugar per annum. This sale has been completely stopped, and the loss thereby incurred is estimated at nearly 25,000*l.* Instead of Stettin made sugar there has been imported to Finland via Stettin—since August to the end of the year—Austrian-made sugar to the amount of 1,700 tons.

German shipping trade has also suffered severely in consequence of the enormous harbour dues imposed on German vessels in Russian ports; of the regular steamer lines between Stettin and Russia some ceased to run, and those that have kept on in order not to be ousted from the trade by foreign flags have had to pay from August to the end of the year 4,400*l.* over and above the dues formerly current.

Thus a ship of 700 register tons had formerly to pay harbour dues in a Russian port 35 *r.*, whereas latterly the charges amounted for the same vessel to 700 *r.*, which in five voyages during the year would be about 1,000*l.* In 1891, in consequence of the grain prohibition by Russia, 155 steamers ceased to run between Stettin and Russian ports, but in 1892-93, 259 steamers were taken off the trade. In 1892 the average amount of harbour dues paid by Stettin vessels in Russian ports amounted to 5,600 *r.*, but in 1893 this—had the same number continued to run—would have reached the sum of 134,000 *r.* (12,500*l.*).

Annex A.—RETURN of British Shipping at the Port of Stettin during the Year 1893.
Direct Trade in British Vessels from and to Great Britain and British Colonies.

STETTIN.									
Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.			Total Number of Vessels.			Total Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	
316	...	376	299,531	...	299,531	170	37	207	£ ...
			299,531	...	299,531	106,943	56,100	163,043	3,095
									...

Annex B.—RETURN of British Shipping at the Port of Swinemünde for the Year 1893.
Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.						Cleared.			
Total Number of Vessels.			Total Tonnage.			Total Number of Vessels.			Total Tonnage.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	Total Value of Cargoes. £
164	...	164	133,950	...	133,950	...	19	19	16,784
									368
									...

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.										Cleared.							
Countries whence Arrived.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes. £	Countries to which Departed.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes. £
	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.				With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
Germany ...	...	1	1	...	452	452	15	...	Norway ...	...	...	1	...	778	778	18	...
United States ...	...	...	1	...	2,169	2,169	26	...	Russia ...	...	...	49	...	38,487	38,487	905	...
									Sweden ...	...	...	1	...	931	931	19	...
									Sweden ...	...	...	92	...	76,645	76,645	1,709	...
									Other Prussian ports ...	...	...	4	...	2,936	2,936	69	...
Total ...	1	1	2	2,159	452	2,611	41	...	Total ...	...	...	147	...	119,777	119,777	2,720	...
Direct trade ...	164	...	164	133,950	...	133,950	3,047	...	Direct trade ...	...	...	19	...	16,784	16,784	388	...
Total in 1893 ...	...	...	166	...	...	136,561	3,088	...	Total in 1893 ...	...	...	166	...	136,561	136,561	3,088	...
	...	...	...	...	...	...	...	...	1892 ...	...	...	174	...	145,163	145,163	3,219	...
	...	...	...	...	...	...	...	...	Decrease	...	...	8	...	8,602	8,602	131	...

Annex C.—RETURN of all Shipping (Sailing Vessels) Entered and Cleared at the Ports of Swinemünde and Stettin during the Year 1893.

ENTERED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	61	7,640	...	...	61	7,640
German	337	47,206	28	3,560	415	50,766
Danish	235	14,529	6	201	241	14,730
Norwegian	37	13,365	...	...	37	13,365
Swedish	147	8,934	1	37	143	8,971
Other countries ...	41	5,469	2	126	43	5,595
Total	908	97,143	37	3,663	945	101,096
" for the year preceding ...	992	107,073	59	5,880	1,051	112,953

CLEARED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	51	6,279	10	1,361	61	7,640
German	383	50,924	46	2,491	429	53,415
Danish	225	12,784	18	2,038	243	14,822
Norwegian	12	2,668	26	12,166	38	14,833
Swedish	134	8,355	16	1,826	150	10,181
Other countries ...	41	5,700	6	1,524	47	7,224
Total	846	86,710	122	21,395	968	108,105
" for the year preceding ...	888	86,666	160	22,686	1,048	111,352

RETURN of all Shipping (Steamships) Entered and Cleared at the Ports of Swinemünde and Stettin during the Year 1893.

ENTERED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	570	589,041	9	7,049	579	596,090
German	1,321	592,870	133	58,690	1,704	651,560
Danish	245	164,593	9	4,153	254	168,746
Norwegian	106	39,171	2	537	110	39,708
Swedish	486	134,008	5	1,532	491	135,540
Other countries ...	90	62,720	2	438	92	63,158
Total	3,020	1,682,413	210	72,399	3,230	1,654,812
" for the year preceding ...	2,833	1,410,441	196	54,160	3,029	1,464,601

STETTIN.

CLEARED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	299	254,867	280	341,223	579	596,090
German ...	1,273	448,641	434	207,250	1,707	655,891
Danish ...	195	129,856	58	38,217	253	168,073
Norwegian ...	31	1,036	80	29,475	111	30,511
Swedish ...	173	45,488	314	90,221	492	135,709
Other countries ...	54	28,069	40	38,877	94	66,946
Total ...	2,030	907,957	1,206	745,263	3,236	1,653,220
„ for the year preceding ...	1,749	690,816	1,266	763,498	3,015	1,454,314

Annex D.—RETURN of all Shipping at the Port of Stettin during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	61	7,640	413	459,529	474	467,169
German ...	400	50,069	1,630	603,235	2,030	653,304
Danish ...	225	14,363	209	115,428	434	129,791
Norwegian ...	37	13,365	108	37,656	145	51,021
Swedish ...	148	8,971	390	114,067	538	123,038
Other countries ...	41	5,464	63	33,859	104	39,323
Total ...	912	99,872	2,813	1,363,774	3,725	1,463,646
„ for the year preceding ...	1,015	107,251	2,592	1,204,763	3,607	1,312,014

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	61	7,640	417	462,641	478	470,281
German ...	414	52,689	1,633	607,566	2,047	1,160,255
Danish ...	227	14,455	208	114,755	435	129,210
Norwegian ...	38	14,823	109	28,459	147	43,282
Swedish ...	150	10,181	391	114,236	541	124,417
Other countries ...	45	7,093	65	37,637	110	44,730
Total ...	935	106,881	2,823	1,365,294	3,758	1,972,175
„ for the year preceding ...	1,015	106,078	2,579	1,192,476	3,594	1,298,554

RETURN of all Shipping at the Port of Swinemünde during the
Year 1893.

ENTREED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	166	136,591	166	136,591
German	15	726	74	48,325	89	49,051
Danish	16	267	45	53,348	61	53,615
Norwegian	...	...	2	2,092	2	2,092
Swedish	...	...	101	21,173	101	21,173
Other countries ...	2	131	29	29,000	31	29,131
Total	33	1,224	417	291,035	450	292,259
„ for the year preceding ...	36	5,652	436	261,838	472	267,490

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	61	7,640	583	599,292	644	606,932
German	429	53,415	1,707	666,891	2,136	720,306
Danish	243	14,822	253	168,653	496	183,475
Norwegian	38	14,823	111	30,511	149	45,334
Swedish	150	10,181	492	145,700	642	145,881
Other countries ...	47	7,224	94	66,946	141	74,170
Total	968	108,105	3,240	1,656,382	4,208	1,764,437
„ for the year preceding ...	1,051	111,730	3,015	1,154,314	4,066	1,566,044

Annex E.—RETURN of all Shipping at the Port of Swinemünde during the Year 1893.

Nationality.	Sailing.			Steam.			With Coals, Coke, &c.			With Grain and General Cargoes.			In Ballast.		
	Number of Vessels.	Tons.	Number of Vessels.	Number of Vessels.	Tons.	Number of Vessels.	Number of Vessels.	Tons.	Number of Vessels.	Number of Vessels.	Tons.	Number of Vessels.	Number of Vessels.	Tons.	Number of Vessels.
British	16	387	166	136,561	166	136,561	...	...	...	...	...	...	...	...	...
Dutch	...	...	45	53,318	20	23,425	...	...	...	...	...	...	...	...	...
Norwegian	2	131	18	18,966	18	18,966	1	66	...	8	107	...	...	...	...
Russian	...	...	2	2,052	2	2,052	...	...	...	...	...	...	...	...	...
Spanish	...	...	6	5,179	6	5,179	...	...	...	...	...	...	...	...	...
Swedish	...	...	5	5,164	5	5,164	...	...	...	...	...	...	...	...	...
	...	...	101	21,474	...	...	...	...	...	101	21,473	...	...	...	...
Total foreign	18	498	343	242,713	217	191,347	1	66	...	8	107	124	9	325	4,403
German ...	15	726	74	45,325	9	7,458	...	...	...	10	442	21	5	284	...
Grand total	33	1,224	417	291,038	226	198,805	1	66	...	18	549	145	14	609	13,753

Annex F.—TABLE showing Return of Principal Articles of
Import to Stettin during the Years 1893-92.

Articles.	Quantity.	
	1893.	1892.
	Tons cwt.	Tons cwt.
Rags	2,137 16	2,234 6
Scraps of all kinds	25,931 18	13,688 10
Cotton (raw and manufactured)..	2,342 4	2,200 4
Drugs, chemicals, &c.	41,295 18	35,434 1
Metals—		
Lead (raw and worked)	824 12	609 8
Iron	154,625 8	135,743 8
Copper	2,473 6	1,380 3
Zinc, tin, &c. (raw and worked)	1,420 16	1,653 7
Coals, coke, &c.	253,271 4	89,436 9
Cement, clays, ores, &c.	298,198 13	264,358 8
Grain—		
Wheat	4,732 0	12,889 9
Barley	5,905 18	3,686 6
Rye	32,382 6	21,118 7
Oats	18,868 0	2,087 3
Maize	62,636 10	52,507 6
Pulse	11,751 14	7,647 6
Other kinds	1,592 10	324 5
Seeds	50,293 12	28,146 7
Wool (raw and manufactured) ..	2,252 16	1,542 4
Paper	9,440 2	8,727 1
Sugar (raw and refined)	1,385 8	1,936 8
Beer and wine	4,886 16	5,450 4
Spirits	2,334 12	1,721 1
Groceries	11,636 10	13,718 9
Coffee	6,116 12	8,329 3
Flour	10,671 10	14,598 4
Rice.. .. .	10,849 6	14,848 4
Petroleum	118,584 4	99,410 9
Oil and grease	47,989 16	49,266 7
Hides and leather	1,273 4	1,775 4
Timber (worked)	30,147 2	37,554 5
(unworked)	105,556 2	93,384 1
Stones and bricks	137,960 4	93,525 8
Herrings	94,050 6	88,518 1
All other merchandise	43,124 2	146,479 2
Total	1,608,743 2	1,355,937 8

Annex G.—TABLE showing Return of Principal Articles of
Export from Stettin during the Years 1893-92.

Articles.	Quantity.	
	1893.	1892.
	Tons cwts.	Tons cwts.
General merchandise	283,201 1	224,936 8
Metals (raw)	46,131 16	43,611 18
„ (worked)	6,626 2	6,875 16
Coals and coke	9,469 2	8,317 6
Cements	51,949 12	57,759 8
Grain—		
Wheat	5,434 18	7,117 0
Barley	7,951 0	5,120 12
Rye	2,477 6	4,855 18
Oats	4 18	505 0
Maize	1,871 14	1,075 16
Pulse	1,274 4	1,780 2
Other kinds	317 18	371 16
Seeds	15,398 2	14,368 2
Sugar (raw)	81,593 10	72,836 0
„ (refined)	48,502 8	34,551 8
Spirits	6,901 12	7,427 12
Timber (worked)	27,289 6	41,448 10
„ (unworked)	16,348 2	14,622 6
Herrings	11,725 18	9,835 14
Rags	6,906 1	5,571 12
Total	631,374 10	562,988 4

Annex H.—TABLE showing Specification of the Different Articles and Quantities Imported from and Exported to Great Britain during the Years 1893-92.

Description of Articles.	Imported.		Exported.	
	1893.	1892.	1893.	1892.
	Tons cwts.	Tons cwts.	Tons cwts.	Tons cwts.
Rags	4 12	10 2	2,614 10	2,414 8
Scraps of all kinds ..	252 16	1,967 12	66 8	6 0
Cotton (raw and manu- factured)	1,838 14	1,974 2	12 0	1 8
Drugs, chemicals, &c. .	8,906 4	7,495 6	987 18	1,545 6
Metals—				
Lead (raw and worked)	295 0	17 8	5,955 16	5,039 8
Iron (raw)	81,208 2	70,223 14	67 14	378 0
" (worked)	12,685 4	4,957 4	66 1	59 4
Copper (raw and worked)	1,322 12	834 18	36 4	11 6
Zinc, tin, &c. .	507 12	930 2	20,144 0	16,868 0
Coal and coke	250,645 2	88,046 2	223 10	1,155 0
Cements, clays, ores ..	19,549 2	33,357 4	175 8	2,327 14
Grain—				
Wheat	..	0 8	0 2	25 10
Barley	..	1 12	2,317 2	1,455 0
Rye	..	27 4	0 4	..
Oats	..	0 8	..	..
Maize	..	..	..	..
Pulse	38 6	2 14	51 10	59 4
Other kinds	..	68 4	9 8	0 10
Seeds	3,847 12	3,292 12	638 7	525 16
Wool (raw and manu- factured)	1,631 1	1,032 14	149 10	58 14
Paper	30 8	44 8	6,879 12	5,660 10
Sugar (raw)	0 2	26 8	47,140 16	37,079 16
" (refined)	0 10	..	20,807 12	14,764 2
Beer and wine	480 4	491 8	1 6	32 18
Spirits	155 6	126 12	716 2	942 6
Groceries	1,117 3	2,165 0	135 4	489 2
Petroleum	..	489 14	..	..
Oils and grease	9,968 8	11,844 16	5,025 18	4,543 0
Hides and leather ..	41 8	87 18	66 2	41 8
Timber (worked) ..	160 14	257 18	19,527 4	32,130 2
" (unworked) ..	91 10	8 2	14,951 14	13,586 10
Slates, stones, and bricks	5,642 6	10,626 18	15 12	53 12
Coffee	882 2	1,428 16	0 2	..
Farina	7 0	48 14	7,122 6	4,443 12
Flour	0 6	0 8	371 4	27 16
Molasses	2 10	355 14	520 6	758 12
Herrings	48,944 14	50,341 8	18 6	11 14
All other merchandise	16,101 3	109,391 12	1,817 16	1,707 16
Total	466,587 12	402,005 2	158,632 14	143,208 4

Annex I.—TABLE of Importation and Exportation in the Port of
Swinemünde only during the Years 1893–92.

Description of Articles.	Imported.		Exported.	
	1893.	1892.	1893.	1892.
	Tons cwts.	Tons cwts.	Tons cwts.	Tons cwts.
Rags and scraps of all kind	2,811 10	293 4	97 14	405 8
Cotton and wool ..	25 12	31 0	120 0	54 3
Drugs, chemicals, &c. .	1,463 16	1,675 12	207 18	320 0
Metals—				
Lead (raw and worked)	..	..	152 14	152 8
Iron (raw and worked)	3,744 0	4,002 13	2,838 12	3,931 0
Copper, zinc, and tin ..	19 8	1 0	587 12	324 9
Coal, coke, &c. .	362,217 4	326,130 5	271 8	1,717 12
Cements, clays, ores, &c.	517 0	9,014 11	21,220 8	21,352 7
Grain—				
Wheat	1,695 14	1,792 3	60 2	..
Rye	2,347 6	192 14	..	..
Barley	20 18	0 3	..	..
Oats	115 0	105 4	..	..
Seeds, potatoes, &c. .	4,018 6	8,841 1	24 18	303 5
Paper	..	76 7	27 12	19 1
Sugar	0 12	19 2	4,873 0	3,603 9
Beer, wine, and spirits	28 6	33 2	6 8	13 18
Petroleum, oils, and grease	559 8	128 4	69 2	0 5
Hides and leather ..	..	24 15	0 12	87 1
Timber (worked) ..	1,624 16	331 5	364 6	25 1
" (unworked) ..	10 6	1,449 5	241 0	554 7
Stones and bricks ..	35,495 18	44,014 15	3,320 4	2,962 11
Groceries and molasses	272 6	135 8	307 14	376 5
All other merchandise	11 16	139 5	7 14	14 16
Total	416,999 2	398,430 18	34,798 18	36,217 6
Herrings (fresh) ..	3,848 16	7,435 15	13 18	12 5
" (in barrels) ..	2,419 0	571 0	74 0	..
Cattle (head)	1 0	3 0	3 0	..

Annex J.—TABLE showing the Total Tonnage of all Articles Imported to Stettin from Foreign Countries during the Years 1893-92.

Country.	Quantity.	
	1893.	1892.
	Tons cwt.	Tons cwt.
Argentine	1,822 4	2,053 6
Brazil	..	..
British Central America	1,154 0	570 2
" East Indies	2,808 16	..
Belgium	60,019 12	62,682 14
Denmark	23,806 2	40,072 6
France	22,247 8	25,131 2
Great Britain	466,587 12	402,005 2
Holland	29,615 18	17,247 0
Italy	2,358 16	868 0
Norway	44,748 2	89,142 14
Portugal	13,214 2	13,323 4
Roumelia	61,310 2	3,945 8
Russia	66,860 16	42,731 2
Spain	48,575 6	27,452 4
Spanish America	..	1,132 14
Sweden	282,828 10	250,990 12
Turkey	134 2	3,099 16
United States of America ..	193,460 16	184,965 10
Zollverein ports	255,731 14	227,009 16
Free harbour of Hamburg ..	31,459 6	10,605 16
Total	1,608,743 4	1,355,937 8

Annex K.—TABLE showing the Total Tonnage of all Articles Exported from Stettin to Foreign Countries during the Years 1893-92.

Country.	Quantity.	
	1893.	1892.
	Tons cwt.	Tons cwt.
Brazil	781 16	54 2
Belgium	2,432 12	4,048 10
China	589 6	..
Denmark	48,204 6	46,085 0
France	36,024 0	23,266 10
Great Britain	158,632 14	148,203 4
Holland	23,296 8	44,694 10
Italy	4,743 10	9,052 4
Norway	19,302 12	14,654 2
Portugal	..	808 4
Russia	61,993 18	54,289 16
Spain	2,323 12	2,650 4
Sweden	72,876 14	60,047 18
United States of America ..	34,077 8	24,271 12
Zollverein ports	165,920 12	130,773 18
Free harbour of Hamburg ..	175 2	88 12
Total	631,374 10	562,988 4

Annex L.—NATIONALITY of Sea-going Vessels which Entered the
Port of Stettin during the Year 1893.

Nationality.	Sailing.	Steam.	Total.
	Number.	Number.	Number.
Belgian	..	3	3
British	61	413	474
Danish	225	209	434
Dutch	18	34	52
French	8	3	11
German (including coasting) ..	613	1,639	2,243
Italian	1	..	1
Norwegian	37	108	145
Russian	16	18	34
Spanish	..	5	5
Swedish	148	390	538
Total, 1893	1,127	2,813	3,940
„ 1892	1,301	2,594	3,895

Annex M.—SUMMARY Table of Importation and Exportation in the
Port of Swinemünde only during the Year 1893.

Description of Articles.	Imported.		Exported.	
	1893.	1892.	1893.	1892.
	Tons cwts.	Tons cwts.	Tons cwts.	Tons cwts.
Coal and coke	362,217 4	326,130 5	271 8	1,717 12
Grain (wheat, rye, barley, oats)	4,178 18	2,090 4	60 2	..
General cargo	50,603 0	70,210 9	34,467 8	34,499 14
Total	416,999 2	398,430 18	34,798 18	36,217 6
Herrings (fresh) ..	3,848 16	7,485 15	18 18	540 0
„ (in barrels) ..	2,419 0	571 0	74 0	..
Cattle (head)	1	3	3	..

Annex N.—VESSELS Built in Stettin during the Year 1893 (Delivered).

Number.	Name of Vessel.	Gross Register Tonnage.	Net Register Tonnage.	Indicated Horse-Power.	Description of Vessel.	Owners.	Where Belonging to.	Where Built.
198	Brandenburg	10,000	...	8,000	Armoured corvette twin screw	Imperial Government	Germany	Vulcan Works
202	Holenzollern	4,680	...	3,000	Video steamer twin screw	"	"	"
203	Comet	1,860	...	2,000	Screw steamer	Austrian Lloyd	Trieste	"
205	Vindobona	1,342	3,303	...	"	Neue Dampfer Company	Stettin	"
206	Director Hoppenhagen	1,785	1,385	670	"	Government Department	Lübeck	"
208	Waver	67	32	100	Paddle steamer	German-American Petroleum Company	Hamburg	"
209	Brassland	3,756	2,542	1,850	Petroleum tank steamer	"	"	"
310	Siegfried	175	147	80	Screw steamer	Comm. Industrie Association	Stettin	"
312	Laake I.	499	185	900	Ice-breaker	Merchants	Amsterdam	"
313	Deutscher II.	280	69	360	"	"	"	"
315	Deutschland	1,081	12	50	Screw steamer	Uschiba Company	Tanga	"
408	Fluss	844	1,587	...	Sailing ship	Fazzen Collet	Rosinek	Moller and Holberg
413	Anna Schwalbe	1,081	1,587	...	"	Hornthauer	Bremen	"
418	Albatross	1,081	1,587	...	"	North German Lloyd	Berlin	"
419	Coel	1,081	1,587	...	"	B. Schneider	Altona	"
420	Hansa Basmark	600	440	300	After paddle steamer	C. E. Godefrum, succ.	Faher	"
421	Frederik	18	5	50	Screw steamer	H. Ottmann	Hamburg	"
423	Schnebeck	418	164	560	Paddle steamer	Elbe and Saale Steamship Company	"	"
424	Hansa	21	10	120	Screw steamer	Carl Kohn	Stettin	"
425	Adler	50	17	160	"	Gebr. Tonno	Magdeburg	"
427	Mosau	12	2	150	Bridge	Thke Ingep	Friedenwalde	"
430	Regatta	7	32	200	Twin-screw steamer	Thke Ingep	Magdeburg	"
431	W. J. L. L. L.	412	292	200	Screw steamer	Thke Ingep	Magdeburg	"
432	Stadt Memel	216	204	150	Screw steamer	W. J. L. L. L.	Stettin	Nische and Co.
433	Helene Elise	20	8	60	"	E. Hansen	"	"
						A. Goldmann	"	"

Annex O.—SHIPS in the Course of Construction at the Beginning of the Year 1894.

Number.	Name of Vessels.	Gross Register Tonnage.	Net Register Tonnage.	Indicated Horse Power.	Description of Vessels.	Owners.	Where Belonging to.	Where Built.
199	Wissenburg ...	...	10,000	8,000	Armoured corvette	Imperial Government	Germany	...
211	Washington... about	4,000	...	1,800	Petroleum tank steamer	German - American Petroleum Company	Hamburg	...
214	(?) ...	3,800	...	1,850	" " "	German - American Petroleum Company	"	...
216	(?) ...	8,000	...	4,100	Twin-screw steamer	Hamburg American Packetfahrt	"	...
422	Falke... about	1,680	1,735	650	Screw steamer	Norddeutscher Lloyd	Bremen	Möller and Holberg
428	(?)... ..	(?)	372	160	Steam dredge	Royal Harbör-Inspection	Swinemünde	"
429	(?)... ..	(?)	7	20	"	"	"	"
431	(?)... ..	(?)	10	...	Hand dredge	Magistrate Greifenhagen	Greifenhagen	"
432	(?)... ..	(?)	170	300	Paddle steamer	Lauenburger Tugboat Company	Lauenburg	"
433	(?)... ..	(?)	(?)	(?)	Twin-screw steamer	"	Straßburg	"
434	(?)... ..	600	(?)	250	Screw steamer	E. Haubuss	Stettin	Nitsche and Co.
435	(?)... ..	25	...	30	Steam yacht	Nitsche and Co.	Grabow	"
11	(?)... ..	...	...	...	...	...	...	...

SWINEMÜNDE.

Mr. Vice-Consul Rose reports as follows :—

Swinemünde.
Shipping in
general.
Number and
tonnage of
ships entered
and cleared.

The port of Swinemünde was blocked by ice from January 13 until February 24, so that navigation was impossible.

There entered at the Swinemünde custom-house for loading or discharging during the year 1893, 450 vessels, with a tonnage of 292,262, against this in 1892 were 472 vessels, with a tonnage of 267,490, a decrease in 1893 of ships, but an increase of 24,772 in tonnage.

Of the above-mentioned vessels there were—

					Number of Vessels.	Tons.
Sailing	..	..	..	..	33	1,224
Steam	..	..	..	..	417	291,038
Total	..	..	..	..	450	292,262

Nationality
and tonnage.

Nationality and tonnage of the above is shown in the return of all shipping at the port of Swinemünde (Annex E).

British
shipping.

British shipping has decreased as compared with that of the previous year (Annex B).

Ships
belonging to
Swinemünde.

The number of ships registered as belonging to the port of Swinemünde at the end of 1893 was—

					Number of Vessels.	Tons
Steam	..	..	..	..	4	1,589
Sailing	..	..	..	..	10	2,503
Total	..	..	..	..	14	4,092

Freights
paid to
Swinemünde.]

Steamer freights paid to Swinemünde averaged as follows :—

From—	January to March.	April to June.	July to September.	October to December.	Articles.
Newcastle ..	s. d. 4 6	s. d. 4 2½	s. d. 4 3	s. d. 4 2½	Per ton of coals
Burnt Island ..	4 9½	..	4 6½	..	" "
Hartlepool ..	5 0	..	..	..	" "
Sunderland ..	..	..	4 0	..	" "
Newcastle ..	6 1½	..	..	..	" coke
" ..	..	3 10½	3 8½	..	" smalls
Cardiff ..	5 3	5 3½	5 3	5 8½	" coals
Marstrand ..	1 m. 50 pf	..	..	1 m. 50 pf.	Per case of her- rings, 120 kilos.

The Hamburg-American Steam Packet Company kept their regular lines running between Stettin and New York, calling at Scandinavian ports every fortnight, completing their cargoes at Swinemünde, taking 12,498 tons of cement and other small amounts of goods, and 2,922 tons of raw sugar. Hamburg-American Steam Packet Company.

The three principal articles of import to Swinemünde are English coals or coke, Swedish stones, and Swedish fresh herrings. Import to Swinemünde.

The import returns of coals and coke, in spite of the strikes in England, show an increase of 36,087 tons against the preceding year. Coal and coke

The import of Swedish stones (paving stones) has this year decreased as against 1892 by 8,159 tons. The cause of this large difference is caused by the very high river freight from Swinemünde to Berlin or other places, so that the steamers discharged their cargoes direct at Stettin, instead of Swinemünde, and the stones were forwarded from Stettin to their destinations by lighters. Swedish paving-stones.

The river freights for stones from Swinemünde to Berlin were— River freights.

Year.						Per 50 Kilos.
						Pfennigs.
In 1893 ..	..	..	..	..	..	13 to 14½
1892 ..	..	..	..	..	..	10 11½

The river freights for coals were as following in 1893 from Swinemünde :—

To—	Per Last of 3,000 Kilos.			
	January to March.	April to June.	July to September.	October to December.
	Marks.	Marks.	Marks.	Marks.
Berlin ..	10 to 11·25	9 to 11	9 to 9·75	9·50 to 10·50
Stettin ..	..	2·50 3·75	2·75 3·30	3 3·75

The import of fresh herrings for 1893 is far behind that of 1892. The decrease was not less than 3,637 tons, or 50 per cent. These herrings being imported only during the winter months could not be brought into Swinemünde on account of the ice in the Baltic, which proved a heavy loss for the importers. The import was stopped for nearly two months (January and February). Swedish fresh herrings.

The prices paid by consumers for grain at Swinemünde and neighbourhood were as follows ;— Prices of grain, &c.

Month.	Per 50 Kilos.				
	Oats.	Barley.	Eye.	Beans.	Peas.
	M. pf.	Marks.	M. pf.	M. pf.	M. pf.
January	7 50	8	7 25	9 50	9 0
February	7 50	8	7 25	9 50	9 0
March	7 50	8	7 25	9 50	9 0
April	7 50	8	7 25	9 50	9 0
May	8 0	8	7 50	9 50	9 0
June	8 0	8	7 50	9 50	9 0
July	8 50	8	7 50	9 50	9 0
August	8 50	8	7 50	9 50	9 0
September	8 50	8	7 0	9 50	9 50
October	8 50	8	7 0	9 50	9 75
November	8 50	8	7 0	9 50	9 75
December	8 50	8	7 0	9 50	9 75

The industry of Swinemünde and its near vicinity is very small.

Putty factory
of Louis
Nagel.

The Putty Factory of Mr. Louis Nagel exports nearly half of the product to Sweden, Norway, and Denmark. There are employed 35 labourers, whose wages amount to about 2 marks a day.

Swinemünde
Steamship
Company.

The Swinemünde Dampfschiffahrts Actien Gesellschaft keeps up a regular passenger and freight line between Swinemünde and Stettin. These steamers were built in 1891 at Messrs. Möller and Holberg's building yard on the Oder, at the price of 150,000 marks each. The dividend payable for 1892 will be 3 per cent.

Swine River
regulations.

The work on the new Swine River alterations are getting on quickly. Work was started in April and will be carried out with the utmost despatch. The pier which is to be erected in front of the "Grüne Fläche" Island will be commenced in April or May this year. (For plan of new alteration see Germany (Stettin) Annual Series, No. 1201, Preliminary Report for the year 1892.) The cut through the Mellin is about half finished.

Colberg.

No British ships entered the port of Colberg.

Ships arrived
from Great
Britain.

RETURN of Foreign Shipping Entered and Cleared at the Port of Colberg from and to Great Britain during the Year 1893.

ENTERED.

Nationality.	With Cargo.				Total.	
	Sailing.		Steam.		Number of Vessels.	Tons.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.		
German	8	1,661	1	367	9	2,028
Danish	4	850	...	...	4	850
Swedish	9	1,812	...	...	9	1,812
Russian	3	608	...	...	3	608
Dutch	2	424	...	...	2	424
Norwegian	2	341	...	...	2	341
French	1	142	...	...	1	142
Total	29	5,848	1	367	30	6,215

CLEARED.

Nationality.	With Cargo.				Total.		Ships cleared for Great Britain.
	Sailing,		Steam.		Number of Vessels.	Tons.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.			
German	1	94	...	...	1	94	
Norwegian	2	341	...	...	2	341	
Dutch	1	217	...	...	1	217	
Swedish	1	174	...	...	1	174	
Total	5	826	...	...	5	826	

Import from Great Britain by sea—

Import from
Great Britain.

Articles.						Quantity.	
						Tons	cwts.
Coals	..	..	..	..	..	8,696	6
Coke	..	..	..	..	..	464	0

Export to Great Britain by sea—

Export to
Great Britain.

Article.						Quantity.	
						Tons.	
Pit-props	..	..	..	..	..	974	

No British ships entered this port.
Import from Great Britain—

Stolpmünde.

Articles.						Quantity.	
						Tons	cwts.
Coals	..	..	..	..	..	2,102	8
China clay	..	..	..	..	..	230	0

No British ships entered this port.
Import from Great Britain—

Rügenwalde.

Article.						Quantity.	
						Tons	cwts.
Coals	..	..	..	..	..	891	4

Export to Great Britain—

Article.						Quantity.	
						Tons.	
Pit-props	..	..	..	..	..	3,404	

Wolgast.

One British steamer entered Wolgast, the steamship "Mula" of 452 register tons, crew 15, from Drontheim (Norway) with "Purple ore," cleared for "Abo" (Finland) in water ballast. From London and West Hartlepool arrived 2 German sailing ships 592 registered tons, importing 518 tons of timber.

Stralsund.
British
shipping.

The following 2 British ships entered the port of Stralsund :—
Brig "Palestine" 69 registered tons, crew 8, in ballast from Stettin, cleared with molasses for Dunquerque.

Steamship "Rook" 370 registered tons, crew 14, with linseed oil from London, cleared in ballast for Copenhagen.

IMPORT from and Export to Great Britain.

Cargoes.	Quantity.	
	Import.	Exports.
	Tons.	Tons.
Coals	14,200	..
Linseed	2,200	..
Linseed-oil	821	..
Copal	20	..
Raw sugar	..	850
Total	17,241	850

Anklam.

This place situated at the River Peene should be mentioned especially on account of its sugar factory, the "Pommersche Zucker Fabrik," the manager of which gives the following report.

Sugar factory.

The factory worked 49,862½ tons of beetroot, the price of which was 115 pf. per 50 kilos.

They produced—

Class.	Articles.	Quantity.
		Tons.
I	Raw sugar	6,169
II	"	500
	Molasses	750

Export to foreign countries amounted to 4,368 tons (class I). The price for raw sugar, class I, was in average free on board Anklam 13 marks 66 pf. per 50 kilos.

The factory used :—

Articles.	Quantity.
	Tons.
Scots coals (Lochgelly)	5,000
Silesian coals	270
" coke	250

There are employed, besides the office staff, 260 male labourers and 40 female labourers, the former earn in wages 2 marks 35 pf. per day and the latter 1 mark 30 pf. per day.

The dividend payable will probably reach 20 per cent. or even more.

There is also a factory situated at Anklam, viz., the Machine Works and Iron Foundry of Messrs. Gebrüder Münter.

They manipulate yearly about 2,000 tons of pig iron and 100 tons of bar iron, they use 1,800 tons English coke, 600 tons Scotch coals, and 1,200 tons Silesian and Westphalian coke. They employ more than 200 working men, whose wages amount to 800 marks a man per year.

The crops in the district of Usedom Wollin were during 1893 Crop. very bad. The percentage of the grain harvest taken in proportion to 1892 was as follows:—

Wheat 75 per cent., rye 62 per cent., summer rye 81 per cent., barley 77 per cent., oats 52 per cent., peas 45 per cent., hay 66 per cent.

In Demmin is also situated a large sugar factory, the Directors of which give the following report:—

The factory worked 39,761 tons of beetroot at the price of 110 pf. per 50 kilos., and produced:—

Class.	Articles.	Quantity.
		Tons cwt.
I	Raw sugar	4,797 4
II	"	425 2
III	"	750 0
	Molasses	75 0

Part of same was sold to inland refineries, part was exported to England, Netherlands, and also America.

Prices at Demmin were for raw sugar:—

Class.	Articles.	Per 50 Kilos.
		M. pf.
I	Raw sugar	14 68
II	"	11 50
	Molasses	2 0

The factory used—

Articles.	Quantity.
	Tons.
English coals	4,500
German „	1,700

There are employed—

Occupation.					Number
Labourers—					
Male	..	..	..	..	360
Female	..	..	..	..	12

The average wages per day were 2 marks.

The dividend for 1893-94 will be declared in August. Last year 15 per cent. was paid. The stock capital is 750,000 marks.

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AND FINANCE.

GERMANY.

REPORT FOR THE YEAR 1893

ON THE

TRADE AND AGRICULTURE OF MANNHEIM
AND DISTRICT.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1236.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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GERMANY.

MANNHEIM.

Consul Ladenburg to the Earl of Kimberley.

My Lord,

Mannheim, May 18, 1894.

I HAVE the honour to forward to your Lordship herewith the Annual Report on the Commerce, Industry, and Agriculture of my District for the year 1893.

I have, &c.

(Signed) FERD. LADENBURG.

Report on the Commerce, Industry, and Agriculture of the Consular District of Mannheim for the Year 1893.

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In the year 1893 trade and industry suffered under very untoward conditions: the continued depreciation of silver, the outbreak of the German-Russian tariff war, the suspension of the commercial treaties with Spain and Servia, the almost total failure of the hay and fodder crops, the widespread apprehensions of a renewal of the cholera epidemic, and lastly the prospect of fresh and heavy taxation, all these things combined to injuriously affect trade in general, the more so since the previous year had been by no means a prosperous one.

Corn trade.

For the corn trade 1893 was certainly not favourable. Such an abnormal period as 1892 could not but influence the following year. It is true the decline in prices was no longer so rapid and precipitous, yet the fall continued with slight interruptions throughout the year, and enterprise so far from being given opportunity to recover from the bitter experience of 1892 became almost totally paralysed. At the beginning of the year it was thought that the tide would change, and that a revival was about to set in, but all such expectations were soon recognised to be an utter delusion. The large visible supplies in the United States coupled with the monetary crisis compelled American holders to clear out at any price, and the other corn exporting countries had to follow. The supplies in the chief European markets reached quite unusual dimensions, so that the arrivals could hardly be warehoused, and also in Mannheim the emergency was very great.

In 1893, Germany had a good wheat crop. In Baden it is estimated at 85 per cent., and also in Wurtemberg, while in Prussia it is given at 94 per cent., and in Bavaria at 95 per cent.

During the first 6 months a considerable business in wheat was done in the Mannheim market. Stocks of homegrown wheat had become exhausted in course of the spring, and the demand for foreign corn grew active. Our market was replenished mainly from the United States, but Roumania and the La Plata States also contributed considerable supplies. After the harvest North Germany also participated, but more towards the end of the year. On the other hand Russian wheat, usually a chief factor in our market, was in 1893 owing to the tariff war almost totally absent, and what lots reached us were in transit for Switzerland. Moreover our struggle with Genoa and Marseilles for possession of the Swiss markets became more severe. In South Germany a fair demand for consumption prevailed throughout the summer, but slackened greatly after September, and stocks in Mannheim accumulated to an almost unparalleled extent. The extremely low prices contributed to bring about this excessive import. And then the improvement that was expected by reason of America's having a smaller crop of wheat did not take effect. Prices, on the contrary, dropped still further. The actual suspension of the Sherman Act caused indeed a slight recovery. It proved, however, to be but transitory. Nor did the raising on August 1 of the import duty on Russian corn by 50 per cent. exercise the slightest influence. Our market grew rather flatter, and the Russian corn being driven from Germany almost exclusively to England, caused the depression in prices to gradually extend to all the other markets.

In Mannheim the highest price for wheat was 2*l.* 2*s.* per quarter in May, and in December it had fallen to 1*l.* 19*s.* 6*d.*, almost beating the record of the last 17 years.

Business in rye was extremely quiet. As stated in last year's Rye report, the great cheapness of wheat is causing it to gradually supplant rye as the chief German bread corn. Russia, usually our predominant source of supply, sent us in 1893 hardly any rye at all, and our reduced demand was covered partly by North Germany, partly by Roumania that had a good harvest. Highest prices 1*l.* 16*s.* 8*d.* per quarter in June, lowest 1*l.* 14*s.* per quarter in October.

The South German barley crop was indifferent, and in the Grand Duchy of Baden, though sound, the barley was yellow. The want of rain and total failure of the pastures caused large quantities of grinding descriptions to be imported. Austria had a good but deficient harvest, while Hungary, both a good and abundant crop. After the harvest when it was found that our home growth was little suited for malting, the demand for Hungarian barley became active, and the import from Roumania also increased. Although fluctuations were not important yet prices averaged higher than in 1892, considerably lower, however, than in 1890-91.

In spite of the abundant 1892 barley crop and large imports, stocks were cleared by the spring, since all the breweries and malters gladly availed themselves of the excellent quality of the 1892 barley to begin the new year with some of that in hand. In consequence, by March the demand had become very active and the improvement of price lasted till the close of the malting season. Although the consumption of beer up to the end of August left nothing to be desired, and our breweries were fully occupied, yet malt rose in price only when the new barley harvest promised to be deficient owing to the dryness. It turned out fully one-fifth short and rain during the harvest time damaged the quality. It is observed that notwithstanding inferior or dear malt and hops, our breweries persist in over-production with corresponding deterioration in the quality of the beer.

The crop in Baden, the Palatinate, and Wetterau was a failure, and, moreover, also in Wurtemberg the chief South German growing country. The want of grass in the spring and summer caused the consumption of oats to be quite unusually large, and after the harvest, with its indifferent yield, the demand became yet more active. The price rose in bounds from 1*l.* 1*s.* per quarter in January to 1*l.* 6*s.* 7*d.* in June, and then during the rest of the year gave way a little, but not much. For 15 years we have not known such high prices for oats. The consumption was covered at first by American and afterwards, Russian grain being excluded, by Roumanian oats.

A further result of the failure of the fodder crops was enhanced consumption of maize, especially in South Germany and Switzerland. The distilleries also took a large quantity. The United States furnished but little, and the La Plata States hardly any supplies at all; fortunately Roumania had an excellent harvest, so

that all requirements could be easily met, and prices varied but little, showing even a small decline by the end of the year.

Hops.

While for brewing the weather in the spring and summer was exceedingly favourable, to the growth of the hops, the prolonged dryness and heat was very injurious. These two features greatly strengthened the market and occasioned sudden rises of price. Within 3 or 4 weeks, 1892 hops rose from 6*l.* and 6*l.* 10*s.* to 9*l.* and 10*l.* for prime quality. In consequence, brewers supplied themselves freely with the previous year's growth, so that at the commencement of the new pick, there were but few old stocks remaining in the market.

The 1893 crop of hops as regards the chief districts, Baden, Bavaria, Elsass Lothringen, and Wurtemberg, proved to be one of the scantiest in quantity that we have had for many years. That prices did not reach any excessive elevation we owed to the higher average yield in other countries, especially in Austria-Hungary and Bohemia, also in North America with its constantly increasing area of cultivation, and lastly in England and Russia. Usually the German hop competes with these countries, but in 1893 their growths were imported into Germany. As regards quality our hops were thoroughly sound, yet not even in the best Bavarian districts did they equal the hops of 1892 in weight. The market accepted the new season's growth in firm but quiet tendency at 10*l.* to 12*l.* 10*s.* according to district, and in Baden considerable quantities were taken at these prices. Owners of the best Bavarian hop gardens and especially of spelt speculated on higher prices, and could scarcely be got to sell at all. They took only the German yield into account and not that in other countries. Flaring newspaper articles helped the delusion. The large dealers were accused of wanting to buy up everything much below value. These views avenged themselves severely on the growers, while so far as they supposed themselves capable of controlling prices the dealers must have been sharply undeceived. Towards the middle of October there was, indeed, a further advance, especially in Bohemia and Saaz, in 8 to 10 days 3*l.* to 3*l.* 10*s.* higher, but there being no justification for it, a fall quickly followed, and before the end of the year prices were again at or below the level at the beginning of the season.

Seeds.

The hopes entertained concerning a good business year in seeds were but partly realised. We began with an active demand at fair prices and almost without reference to quality. Heavy offers later on caused buyers to hold back, and prices fell to unremunerative figures. When, however, the scarcity of fodder began to grow alarming there was a brisk revival, and an inquiry for seeds sprang up that continued to the end of the season so that it could certainly not be termed an unsatisfactory year.

Market garden produce.

The cutting of asparagus began unusually early, already on April 2. Although the plantations suffered from want of rain, yet there was no deficiency in quantity, only the quality showed a falling-off. Peas, however, were an almost total failure. Beans also yielded little, and for anything of good quality high prices had to be paid. As regards other vegetables, especially the autumn

crops, the yield was abundant and excellent. Potatoes were superlative.

In Baden the 1893 apple crop was magnificent, only the fruit ^{Fruit.} was in general rather small. On the other hand, it showed much better keeping quality than usual. This is supposed to have some connection with the early ripening; pears, for instance, being gathered 4 to 6 weeks earlier. The North German demand was active, and the only fault with the apples and pears was that being so abundant they commanded but very unsatisfactory prices. Favoured by the warm weather cherries yielded a plentiful crop that sold rapidly and brought in a good deal of money. Other stone fruit as reine claudes and mirabelle plums and prunes produced so largely that prices sank to unheard of figures. The French peaches and apricots were earlier than ours, and were therefore imported. The import of French and Italian cut-flowers began with the winter at cheap rates, while the sale of our summer flowers to Switzerland and North Germany was up to the average.

As a rule, North Germany supplies the South every year with large quantities of flour and meal, and is able to do so notwithstanding the long carriage by rail by help of the so-called "Staffel Tariff," that is rates of freight based on the principle of the greater the distance the lower the rate. The Staffel tariffs in Germany are somewhat numerous, many districts having their own, but that by which Prussia is able to compete in the South German markets, however beneficial to consumers, is not liked by the South German millers and others interested and they do not applaud. ^{Flour and meal.}

In 1893, however, in virtue of the abundance and cheapness of foreign grain, the millers in the South were able to shut out the North German flour almost altogether. Only in ryemeal was some business done with East Prussia, but not to any great extent or profit, prices constantly receding.

For the first few months of 1893 our steam mills did pretty well, but the water-mills suffered more than usual by the aridity. In flour and ryemeal trade was almost unprofitable owing to the corn market constantly falling, and over-production by new mills to boot, so that consumers at last lost all courage and bought only from hand to mouth. Moreover, in the autumn the abundance and excellence of the potato and fruit crops caused a falling-off in the consumption. The peasantry eat less bread and drank cider instead of beer. Only in meal for cattle feeding was trade fair, and prices rose for a while, yet at the close of the year were lower than at the beginning.

This branch suffered in 1893 under the general depression. ^{Distilleries.} Exportation being difficult the home markets became glutted. The want of fodder, too, was a disadvantage, for the peasants being obliged to pay very high prices for what they required had no money left to drink "brandy." Under such conditions business moved sluggishly. Prices that at the beginning of the year were very low recovered a little, but fell again in the autumn since the abundant harvest of course gave no help. Nevertheless, some distilleries claim to have done a fair trade especially in the first

6 months. Others declare that since, for raw alcohol, the distiller realises barely 17½ marks, while the State, in form of excise duty, makes 70 marks and 90 marks out of it, the article is taxed four to five times its value. And, further, that since even with the present low price of grain, and the most modern plant, alcohol can be produced only at double the present quotations, the distilleries can work only on condition of part of the excise duty being remitted. As is practically and legally the case. It is called the love-gift—*Liebes Gabe*.

For this branch the Russian-German Treaty is of much importance, Russia being actually one of the best customers. The South German distillers eagerly await its action since with Russian corn they can compete with Prussia.

Wine.

From the well-known maladies that almost regularly assail the vine it remained free in 1893, and though hailstorms did some damage here and there they did not materially affect the yield. The 1893 vintage turned out superior even to that of 1892. The conditions were much the same, a very favourable blossoming season, and hot dry summer, and then rains in the autumn turned the scale in favour of 1893, not only by increasing the quantity, but by promoting the so highly-prized "*Edelfaeule*," literally noble rottenness or over-ripeness. The 1893 vintage is considered one of the best, perhaps the very best in the century. Unfortunately, the yield proved to be but two-thirds of a full vintage, and the red wines did not equal those of the previous year. Nevertheless, two good wine years in succession is an occurrence somewhat notable, and greatly renewing the hearts and purses of the vineyard owners. The trade at first were sceptical and reserved, but soon began to buy, and then eagerly, till there was a rush for the new vintage, and prices rose 15 per cent. to 20 per cent. They averaged on the Upper Hardt 15*l.* to 22*l.* 10*s.*; on the Middle Hardt, 22*l.* 10*s.* to 50*l.*; and in the Middle Hessian Vineyards, 20*l.* to 45*l.* per 1,200 litres on the lees.

Of late years foreign wines, especially Italian, have been imported in increasing quantities for improving, that is giving body and sweetness to the common German growths, and with excellent effect, although such mixed wines are generally deficient in keeping qualities. In 1893 this business was not so prosperous, perhaps owing to the excellence of the home vintage, the bad state of trade, and the threatened wine duty. In Baden the demand for superior Spanish wines also decreased while inferior kinds were unsaleable.

Sugar.

Between the prices of raw and refined beetroot sugar usually reigns a certain spirit of contradiction that is often difficult to explain. In theory they ought always to be in harmonious proportion but rarely are. The season 1892-93 was in this respect much like that of the previous year. Satisfactory during the first half owing to somewhat fair relationship between the quotations for raw and for refined sugar, during the second half the market was quite the contrary. Raw sugar rose utterly beyond the capacity of refined to follow and caused a disproportion between

cost of production and market price, such as we had not experienced for years. In 1893 this was brought about by second-hand holders, who having bought cheap were able to dispose of their stocks at good profit, and who throughout the whole summer competed sharply with refiners, causing most of them to suspend operations earlier than usual.

1892-93 raw sugar that in October, 1892, was quoted at 14s. 6*d.* for 92 per cent. reached its highest towards the middle of June, 1893, with 19s. 8*d.* per cwt. Refined sugar was cheapest in the same period at 28s. 5*d.* per cwt., and dearest at 34s. per cwt. in July. Up till then business was undoubtedly profitable, but then prices for refined gradually fell till in November 27s. 6*d.* per cwt. was accepted. The decline was at first ascribed to the improved prospects of the new crop, and later to pressure on the market owing to large offers of new raw sugar. It is true that at the beginning of 1893 allowance had been made for the planting of a larger area and for the competition of fresh factories, but it was supposed that owing to the excessive dryness the beet crop both in France and Germany would show a falling-off. In point of fact, however, it proved to surpass all expectations, the beet was both richer in sugar and the yield greater. The market accordingly became weak, and only on the appearance of definite and reliable statistics was it able to regain firm ground.

About the same area of tobacco was cultivated as in 1892, and Tobacco. the planting was effected in favourable weather in June, but the 1893 crop was inferior in consequence of the hot dry summer. During July and the first few days of August the weather was excellent, but then the total absence of rain completely checked the development of a good leaf. Under these conditions old tobaccos became interesting, and inferior cutting descriptions that had been neglected for years again came to the fore and found buyers at high prices, the more so since stocks were small. Palatinate ribs were also in good demand.

The alarming rumours of a fresh heavy tax on tobacco, and which gained in consistency by the meeting of the Finance Minister at Frankfort-on-Main, had at first a paralysing influence on trade, but later exercised the very opposite effect. The picking of the early tobaccos began in the middle of August. In September the sale of the new sand-leaf followed, and whoever supposed that the new fiscal arrangements would bar business was speedily undeceived. The expectation of a permanent rise gave great stimulus; the tobacco-growing villages were stormed by buyers, and in course of a few weeks the peasants were able to sell their whole sand-leaf crop, and, for the most part, at high prices. Towards October 10 the sale of the autumn tobaccos began, and these also went off quite as quick. In Viernheim and Heddesheim, 30 marks to 33 marks was paid; in Lorsch and Lampertheim, 30 marks to 36 marks; in Iggelheim, 30 marks to 33 marks. The new growth being taken in such haste caused unsatisfactory delivery. Much had unripe and soft ribs, and it is to be feared that the fine bright colour that the leaf at first showed will be

partly lost under fermentation. The same remarks apply to the Haardt crop which was sold a week later. Business in the so-called Gundi districts began on November 5. In Hockenheim and Reilingen, 30 marks to 32 marks was paid; in Plankstadt, 26 marks to 30 marks; and in Seckenheim 22 marks to 25 marks. Lastly, the heavy tobaccos of Oppau sold at 21 marks to 22 marks; Ruchheim, 23 marks to 24 marks; and Mutterstadt at 24 marks to 25 marks. By the end of November, the whole crop, excepting the long Alsatian tobaccos, was disposed of. The rapidity with which it was taken from the growers was unparalleled in our market. It was, of course, largely owing to speculation.

For strips the new crop was little suited. The 1893 leaf was small, strong, heavy, and also to a certain extent burnt badly.

During its short period of growth the tobacco plant demands alternate rain and sunshine to produce a light, delicate leaf. Under prolonged tropical heat, such as we had in 1893, the leaf grows thick; it accumulates nicotine, and yields an article unfit for stripping. Only where a cool moist soil enabled the plant to greater resistance to the heat was anything suitable to be found. Such soils are, however, scarce, and only in the Neckar Valley could tolerably good material be met with. Under such circumstances the stripping business experienced a further decline in 1893. The buying began somewhat hurriedly towards the end of October, and the best Neckar descriptions fetched at first 30 marks; middling, 25 marks to 30 marks. Later on, when the strong quality became clearly recognised, a reaction set in, and the best Neckar growths fell to 25 marks to 26 marks. Upper Baden and the Bavarian Palatinate also contributed some small lots at 22 marks to 30 marks. The leaves were taken down from the rafters in bad condition. The large strippers sent their goods to England, where they had to encounter sharp competition with foreign kinds.

The 1892 raw tobacco was better than that of 1893. The weighing and delivery of the Upper Baden growths bought in the previous November took place in January, and buyers had on the whole every reason to be satisfied. These tobaccos proved to be mostly dry and good in leaf and colour. They had improved beyond all expectation by the prolonged hanging. There were many lots of unquestionably good burning, and not too heavy tobaccos. Business in March was very quiet. Old bunch wrappers were taken at 34 marks to 40 marks; wrappers with fillers at 38 marks to 44 marks. Towards the beginning of April trade in general began to revive, and large transactions were effected in Upper Baden and Alsatian growths at 45 marks to 48 marks, and in good rebuts at 40 marks. Also in May the market remained active, but became again very quiet in June when the second fermentation of the 1892 tobacco was completed. In July buyers from Algiers again visited us, and took a fair quantity, 3,000 cwts., it is said, of cigar leaf. All-in-all trade was better than in 1892. For good tobacco there was always a ready market at rising prices and the year closed with cheerful prospects.

This branch was strongly influenced by the new fiscal propositions that aimed at raising from tobacco, and especially cigars, a revenue of 104,000,000 marks in place of 54,000,000 marks as at present. Business in the first few months was pretty good, enabling the large stocks remaining over in consequence of the badness of trade in 1892 to be tolerably cleared. Indeed, throughout the year our cigar factories had no lack of orders. In October and November so exceedingly active was the demand that it could hardly be met. This was caused by the official organ in Berlin declaring that the new law intended but moderate back taxation, that is, taxation on already existing stocks of cigars, and dealers therefore hastened to increase theirs with a view to anticipating the rise in prices owing to the new tax. On the other hand, cigar makers throughout the year had to contend with want of material, for good cigar tobaccos were both dear and scarce. Sumatra had a crop of 144,689 packages as compared with the previous year's yield of 222,824 packages, while the average price in Holland was 126 c. against 92 c. in 1892. The 1892 Java leaf that is employed chiefly in cigar making for wrappers and fillers was light, ripe, of good flavour, and burnt well, but was so very high in price that manufacturers could make but limited use of it. Brazilian tobacco was plentiful, and gave good useful material at moderate price, but the packing of this description is strongly denounced, leaf of good quality being largely mixed with quite inferior. The same complaint is made against Domingo tobaccos.

Cigar making.

Business in bed feathers was satisfactory in 1893, and a fair trade was done with France and Westphalia. Inferior and cheap descriptions were, however, mostly favoured, and superior marks were neglected. Moreover, the agricultural calamity prevented the peasants that are generally good customers from buying as much as usual.

Bed feathers.

If in 1892 the coffee market was happily free from any extraordinary disturbance, the same cannot be said concerning it during the year under report. In 1893, as so often before, excessive speculation caused great confusion, and involved heavy sacrifices.

Coffee.

January with good average Santos at 79½ pf. in Hamburg and 101½ fr. in Havre was not unfavourable to business. Dealers after keeping back for some time now came forward and bought pretty freely. The speculative influence, however, soon showed itself, prices stiffened, and only up to the middle of February was the trade in negotiation with holders who had bought at previous cheap rates able to cover its requirements. By degrees, as Santos rose to 85 pf. in Hamburg and 105 fr. in Havre, our dealers lost all inclination to buy, and from the middle of February to the middle of April business in general was slow and difficult. In spite of the success which had hitherto attended the operations of the bull movement, and it must be remembered that even the March settlement was effected with tolerable smoothness, nevertheless in many circles of the trade widespread distrust prevailed concerning the possibility of prices being maintained owing to the usual large spring arrivals that were to be expected. And in reality the

market made no further advance. On the contrary, the decline set in; by the end of March 2 pf., and by the middle of April a further 3 pf. had to be conceded. And then came the catastrophe. It was discovered that the Paris speculators had operated in the most reckless manner, and on April 19 prices fell 13 fr. as compared with the previous week, and 19 fr. as compared with end of March.

Coming so suddenly, and to an extent such as probably nobody had anticipated, the fall for the moment completely paralysed trade, the more so since it was an open question whether further complications in Havre were not to be expected. When, however, the first fright had been got over and calmer consideration prevailed, many people availed themselves of the fallen prices, so that during the last week in April and the whole of May a really active trade was done at again slowly-improving quotations. Heavy as the losses had been, the market felt all the benefit of being relieved from the incumbrance of a speculation that, totally disregarding all legitimate limits of supply and demand, met the fate that it merited. The chief advantage was gained by the planters in Brazil, who were enabled to sell the greater part of their abundant production of 1892-93 at prices such as are usually conceded only in consequence of a failure of the crop. On the market returning to normal conditions business during the summer and indeed up to the end of the year remained quiet and steady, and except in August, when Santos was subject to a temporary decline of 3 pf. to 4 pf., prices showed a rising tendency owing to diminishing stocks, especially of cheap descriptions.

Tea.

The consumption of tea is steadily increasing, and also in 1893 the sale was satisfactory. As yet indeed tea hardly competes with coffee with the great mass of the population. They have to acquire the taste for tea and appreciation for its stimulating qualities, moreover for its cheapness compared with coffee. In 1893, coffee being dear, surrogates were largely consumed, and in almost all the grocers' shops roasted malt, rye, and wheat are vended. Of course when coffee again grows cheap these miserable surrogates will disappear. Chinese tea still commands preference with us, but it is said to be only a matter of time, and the more carefully picked Indian and Ceylon teas will take possession of the market altogether.

River
navigation.

The Rhine navigation was carried on under great difficulties in 1893. The river fell very low, probably to the lowest point in the century, and all barges or tow-boats on gaining the higher reaches had to discharge a considerable part of their cargoes into lighters before ascending to Mannheim, and this caused much extra expense and delay. Navigation began only on February 5, but remained open to the close of the year. In spite of all difficulties and impediments the transport of goods by the river is constantly increasing, and it is found advantageous to construct even larger vessels. Thus in 1893 the Mannheim Steam Navigation Company built two tow-boats of Siemens-Martin steel, each of 1,650 tons burden, and have ordered two more of yet larger dimensions. These are the largest river boats in the world, and significant of

the future of river navigation. These huge barges are employed chiefly in the carriage of coals, and though they get little, if any, return cargo, and have to pay towage and often lighterage, yet for the conveyance of heavy bulk goods the waterway triumphantly asserts its superiority in point of cheapness to the railways.

As a coal market Mannheim is growing in importance. The arrivals by river in 1893 amounted to 1,171,678 tons. The year began with fair prospects for the coal trade. The severity of the winter had pretty well cleared our stocks, and prices at the pits were low. But already in March consumption had again so far diminished that our dealers were forced to accumulate stocks, while, on the other hand, the syndicate of coal-owners proved to be defective in organisation. Moreover, contracts had been based on the very low Rhine freights of 1892, and this turned out a serious mistake, for not only did the river remain very low throughout the year and navigation difficult and expensive, but all cargo-room was strongly competed for by the unusually large shipments of corn and fodder. At the Ruhr mines it was at times difficult to get ships at all. And then when the coal strike broke out in England the Ruhr mines were also called upon to supply the North German ports, so that it became in turn also difficult to get coals. Under these conditions, for Mannheim and the Upper Rhine, a regular supply grew impossible, and our dealers were but little able to profit by the consequent rise in prices of some 25 per cent.

The extending use of the so-called American stoves involved increased consumption of anthracite. The coal strike cut off the supply from England, and Belgium availed herself of the opportunity to secure a share in the fresh field in South Germany for this kind of fuel.

Petroleum in 1893 was again lower in price, and refined Petroleum. reached a point which seemed to exclude all further decline. This has been partly brought about by full development of the tank system, from the large ocean and river tank steamers and reservoirs down to the retailing of oil to consumers direct from tank-wagons in the street. The arrivals at Mannheim were larger than before, and the cheapness of the article is greatly promoting the consumption in industry for gas, motors, and electricity. It is observable that the German import duty now amounts to more than the value at cost price of petroleum. The representatives of Russian petroleum attribute the fall to the reckless competition of American producers. They declare that the Russian article is gaining in public favour, and that the Nobel petroleum is becoming preferred at equal or even higher price to the American oil.

The great speculative building activity of the last few years Industry—building. involved the erection in Mannheim, as in other South German cities, of more houses than were actually needed even by the rapidly-growing population, and in consequence a period of dulness, almost stagnation, has set in. This was particularly noticeable in 1893. Trade being, on the whole, indifferent, but few new ware-houses and factories were built, and, except for alterations and

repairs, builders had little to do. Many dwellings still remain empty.

In the timber trade business began in the spring with excessive stocks. They were largely composed of "nun wood," i.e., trees killed by the nun caterpillar, and yielding timber that does not keep or bear storage, and which had therefore to be disposed of at often unremunerative prices. Fortunately the demand in the Lower Rhine countries was pretty active, so that the last stage of the "nun calamity" passed off rapidly. In face of the large stocks, buyers in the forests were necessarily very reserved, and consequently the small supplies of fresh timber occasioned a rise of prices in the summer that by the autumn amounted to from 15 per cent. to 20 per cent. difference on the spring quotations. Unfortunately this in turn caused forest owners to demand much higher prices, which, as against the increasing competition of Galizian and Scandinavian timber forebodes a bad market.

For oak and large pine logs Holland is still the chief customer as far as the Rhine and its tributaries are concerned. But in 1893 the demand was very small; the Dutch fishermen did not prosper, and but few new fishing-boats were built. Moreover, Germany can no longer compete with the Slavonian oak from Fiume.

In deals there was no improvement, and business was unprofitable. The cost of production leaves hardly any margin to distributing firms—at least, no adequate indemnity for the risk and trouble—and the trade is gradually falling into the hands of a few firms with very extensive credit. Freights were high, the building trade stagnant, and, as usual in bad times, buyers were exceedingly captious concerning quality.

The demand for planed stuff was normal, but no better prices could be got. For this branch the tariff war was an especial misfortune, since the Mannheim planing mills draw their chief supply from Russia, the Swedish timber being greatly inferior to the Russian. It is stated that of the South German consumption of North European timber 90 per cent. is supplied by Russia.

Glass
industry.

The large factory at the Waldhof that makes plate and mirror glass had, as usual, no reason to complain of want of orders, but the prices realised were very unsatisfactory. In England, Austria, and America they were not simply low, but absolutely unremunerative, and part of the factory could not work. Shipments to America have ceased almost entirely.

Portland
cement.

In this branch trade in 1893 was active, but with falling prices. The monetary crisis in the United States caused the customary orders to be withheld, while the tariff war, by shutting out the Silesian factories from Russia, caused their whole production to be thrown on the home market. Our Portland cement makers complain that the treaties with Switzerland, Austria, and Italy have given them no relief; that they have now to compete under heavy duties in their former best markets, especially Switzerland, while the Austrian and Swiss factories can export to Germany free from duty, and take all orders in the frontier lands.

Potteries.

Most of the potters began the year with very large stocks,

which they had to dispose of cheap in order to be able to continue production. A further fall in prices all round is expected, since the syndicate of potters of South-Western Germany is threatened with dissolution, and, on the other hand, some new works have been started that cannot be admitted to a convention until they possess sufficient customers.

The crushers benefited, of course, by the failure of the hay and Oil mills. fodder crops, oilcakes being in good demand. In most descriptions of oil seeds the fluctuations were inconsiderable. The difference in price to the extent of 7 per cent. to 8 per cent., occasioned by the closing of the Indian mints, was lost through the abundant yield in East Indian seeds. In rape the harvest was so large that prices could make no progress, in spite of small production in Europe. In palm-kernels and coprah there were some variations, but the latter article for the first six months hardly paid importing into our market. Owing to speculation in Liverpool and Hamburg palm kernels varied 3s. per cwt. Nevertheless, the consumption here has increased. The constantly larger import of American cotton-seed oil occasions crushers great dudgeon, and a higher import duty is demanded.

Trade in rags was quiet. The English import prohibition was raised again in August, but without giving the market the impulse expected. The United States were completely closed, partly by the cholera regulations, partly by the Sherman Act. The home market offered no adequate compensation, although for some kinds of rags there was larger demand owing to the higher price of wood and cellulose. Paper industry.

For wood-pulp the inquiry during the first six months was very active, but afterwards diminished in consequence of the unfortunate state of trade in America. Nevertheless, our wood-pulp factory did very well on the whole, and paid an excellent dividend.

Tapestry and wall-paper manufacturers were affected by the stagnation in the building trade. They complain, moreover, of deterioration in the public taste that inclines to cheap pretentious goods, and shows itself hostile to all higher art and finer productions. This is to be the more regretted since, owing to the exertions and attention now being paid in England and other countries to produce really superior kinds of tapestry, German exports fell off, while the import of foreign goods increased. On the other hand, it is declared that the taste of the German public is beginning to repudiate those realistic flower patterns which have constituted the force of the French makers. In Russia the tapestry trade is in very weak hands, and consequently, apart from the tariff war, always difficult, and in Spain the interruption of treaty reduced business to a minimum.

In foreign descriptions of leather wholesale dealers did very well. In consequence of the American silver crisis prices fell heavily, and the boot and shoe factories freely availed themselves of the opportunity to cover their requirements. On the other hand, the greatly extended production of the cheapest kinds does Leather trade.

not, of course, benefit other descriptions of leather, and complaints are frequent.

Iron industry. All hopes entertained during the last few years of an improvement in the iron industry have hitherto proved deceptive, and if there was little good to report concerning prices and consumption in 1892, there is still less to be said for 1893. One large firm writes: "It would really seem as though we were getting towards the middle of the 7 lean years, for there is hardly a trace of courage and enterprise left, and the complaints in other branches of trade and industry are not cheering." This is taking rather too dismal a view of the situation as statistics show, yet there can be little doubt that in face of over-production, excessive competition, falling prices, and finely cut profits, the position of the German iron industry in 1893 was rather difficult. The tariff war with Russia was attended with very disastrous consequences, the German home market being flooded.

Under these circumstances it is pleasant to be able to record that our manufacturers of agricultural implements and machines did a good trade in 1893. There was a strong demand for all kinds of machines for preparation of cattle food. Threshing machines and steam engines for agricultural purposes were, indeed, less in demand, but this was compensated for by the active inquiry of the corn and saw-mills that laboured under diminishing water-power, and, therefore, were obliged to resort to steam.

As regards the iron industry in general a comparison of prices during the last 7 years may be of interest:—

	Marks per Ton.						
	1887.	1888.	1889.	1890.	1891.	1892.	1893.
Roll'd iron	118	122	180	130	125	115	100
T-beams	106	116	150	125	100	92	86
Boiler plates... ..	160	170	250	200	185	150	145
Pig-iron	50	54	98	84	82	48	45

and other descriptions in proportion.

In almost all the branches of this industry represented in the Grand Duchy of Baden, as for example, weighing machines, pumps, Root's blowers, cranes, railway plant, boilers, hydraulic presses and disintegrators, gas and water meters, brewing plant, railway springs and axles, wire, nail and chain making, the reports concerning trade in 1893 sound more or less unsatisfactory.

Irish stoves. Irish stoves have been introduced successfully into Baden for several years past, and in 1893 reduction of price coupled with improved make enabled the sale to further extension.

The renewal of commercial relations with Russia will be of great relief to the German iron and metal industry, though it is not expected that the lost ground will be easily or quickly regained.

Pforzheim jewellery. One of the most interesting and important industries of the Grand Duchy of Baden is that of Pforzheim. This town of some

30,000 inhabitants devotes itself almost exclusively to the fabrication of jewellery, and its manufacturers do an extensive business with many parts of the world.

In 1893 this branch was also unable to attain the hoped for revival of activity. This was partly owing to the political disturbances in the Argentine and other South American lands, partly to suspension or interruption of trade treaties, but chiefly owing to the monetary crisis in those countries which are usually the principal customers of the Pforzheim gold and silversmiths.

For South America the French exporting houses, who have the business mostly in their hands, have since 18 months sent but few orders, and those only on the most limited scale, and for the cheap so-called "Camelot" goods. For superior kinds there was no demand.

Mexico and Havana sent but few orders throughout the year on account of the silver crisis.

Spain and lower Italy draw their supply of gold and silver chains and jewellery almost exclusively from Pforzheim. And with Italy there was for a time some life in the business, but the Paris stock exchange war against Italian stocks, coupled with the failure of some of the chief Florentine and Milan bankers, cut down trade to the smallest dimensions. Some of the Pforzheim bankers refused acceptances by Italian firms that had previously been regarded as unquestionable; business, therefore, became not merely difficult, but almost impossible.

In default of the Russian market there remained only Germany, Holland, and Belgium, and for cheap goods Austria-Hungary and the Orient. And especially to these lands, in point of style and execution, did most of the Pforzheim firms adapt their production, but which in consequence became flooded with goods, so that hardly one of our manufacturers could boast of much really profitable business.

As regards England, India, and the British Colonies, our exports with exception of certain articles are really quite minimal. To India only a few of our manufacturers export goods at all. And then the Pforzheim people like their wares to be pretty and tasteful, but on the other hand as light as possible, whereas in the English colonies only heavy solid goods are in vogue, which Birmingham can supply much cheaper. The few exporters suffered severely by the silver crisis, and until the rate of silver exchange becomes somewhat steady all notion of regular business, so we are assured, must be given up as hopeless.

On the other hand in gold and silver chains in the rough, or primary stage of manufacture, there is always an active export to England, and also in 1893 several large factories were fully occupied by the inquiry for these hollow machine-made, so-called "Charnier" chains.

Other kinds of jewellery are very rarely sent from Pforzheim to England, and then chiefly as patterns, which an English manufacturer selects in order to adapt them to the taste of his customers.

(1782)

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Slackness of trade caused an exhibition of gold and silver wares to be held in Pforzheim in 1893, and most of its manufacturers contributed. It was especially interesting as showing the whole development of the industry. One of the oldest firms exhibited the various processes in use during the last half century, a show remarkable for its originality. The machinery exhibit included several novelties driven by electricity. The advantages of such a cheap and easily adaptable power were so strikingly illustrated in the exhibition, that the Corporation of Pforzheim at once invited all the manufacturers to unite with a view to establishing a central station for the supply of the whole town. It is now in course of construction, and before the end of the year the majority of factories will be furnished with electric motors from one-twenty-fifth horse-power up to five horse-power and more. The necessity of minute division of power is shown by a polishing machine with double spiral requiring a force of one-thirty-second horse-power.

Black Forest.
Watch and
clock
industry.

Business in the Black Forest in 1893 was somewhat more animate than in the previous year, although already in August the loss of the Russian orders was severely felt. To some manufacturers this was a real calamity. With Great Britain in particular trade showed a further decline, this must presumably be attributed to the general bad state of business, and especially the coal strike.

Textile
industry.

In most branches of the textile industry trade in 1893 was tolerably good. In volume there was a considerable increase on the previous year. The higher prices of yarn occasioned some difficulty, yet cotton goods not only maintained their somewhat high prices but even advanced. In the price of woollens there was no noticeable difference.

The comparatively smaller crop of 1893, coupled with the strike in Lancashire and above all the silver crisis in the United States, exercised a depressing effect on the cotton market, and after several transitory movements upwards cotton at the close of the year stood a penny below the previous January. The whole tendency of the raw material was thus disadvantageous to our spinners, nevertheless for this branch of the textile industry the year 1893 must be esteemed to have been favourable. The production could in general be disposed of readily, and mostly at remunerative rates. Indeed at moments so lively was the demand that in some kinds of yarn real scarcity prevailed.

The weavers had a yet better season than in 1892. The hot summer and warm autumn largely increased the consumption of cotton goods, and our manufacturers were able to place their whole production at very profitable prices and for months in advance. They therefore insisted on their own terms, and those customers who hesitated to concede them were in some cases left totally in the lurch, and later on could not get goods at all.

Chemical
industries.

For most branches of the chemical industry 1893 was an unfavourable year. The depreciation of silver made business with Mexico, India, China, and also Italy very arduous. The closing of the Russian market had a very adverse influence especially on the colour industry. Owing to the tariff war, trade in Russia in

general has fallen into the hands of the English and French manufacturers, and then the home market being called upon to absorb the major part of the production of our factories, there was also a general decline in prices. The expectations excited by the Chicago Exhibition of a great and prosperous business were grievously disappointed by the crisis in the United States. The aniline colour factories that work with America did much less than usual, and only in the autumn and towards the end of the year did an improvement set in.

Naphthaline and anthracene remained steady, and the inquiry especially for the former was good. The fear of a renewal of the cholera caused expectation of a large demand for carbolic acid fluid and crystal, but later on the article was neglected. Coal-tar for briquet making was in good demand throughout the year, although owing to considerable offers from England lower prices had to be conceded. In benzole and homologues rates by reason of overproduction were very low. For fine chemicals business was regular; cocaine and particularly strychnine were in good inquiry, but the American crisis caused the export of quinine to the United States to diminish considerably, and only towards the close of the year did it revive.

In artificial manures our factories had a very fair year. The failure of the hay caused the sowing of rapidly growing fodder crops under assistance of artificial manure, and this expedient proved so far successful that the worst consequences of the fodder famine were prevented.

For lubricating oils and turpentine products demand was steady throughout the year, and very active for the so-called nun-glue, which was employed extensively in the forests for painting the trees as protection against the caterpillars.

Makers of photographic requisites, especially dry plates, did pretty well. The consumption of sensitive quicksilver collodium paper was good, although many photographers after giving it a trial are returning to albuminised paper. Makers had also the advantage of the growing cheapness of almost all chemicals, of glass, and particularly of silver, but it is observable that in spite of the great technical progress in photography, people no longer care to have themselves photographed, at least not so frequently, while babies and dogs' pictures are rarely seen.

The condition of trade and industry forbade any active demand Labour for labour in 1893. Yet there was no great difference, and if in market. some branches a few hands had to be dismissed, they were taken up by other industries. One employer complains that in cases of breach of contract to which young workmen are somewhat inclined, he has no easy or satisfactory remedy. Another remarks that the laws for the protection of workmen by increasing the number of legal holidays and shortening the hours of labour, deprive manufacturers of the necessary latitude for the division of work, so that they are too frequently obliged to engage and dismiss their hands according as the rising or falling demand for labour compels. It is indeed possible that under the new

tendency, the consideration of employers for their workmen that in this part of Germany at least usually induces them to keep the men on under disadvantageous conditions of trade, or even when working at barely remunerative rates, will give place to other laws, and unskilled workmen suffer more than at present from fluctuations in the market.

Victuals.

Victuals were on the whole somewhat cheaper than in the previous year. In Mannheim in 1893, flour averaged $1\frac{1}{4}d.$ per lb., bread first quality $3d.$ per lb., second quality $2\frac{1}{4}d.$ per lb., eggs $11\frac{1}{2}d.$ per dozen, butter $1s. 1\frac{1}{2}d.$ per lb., potatoes $3s. 2d.$ per cwt., beef $7d.$ per lb., veal $7\frac{1}{4}d.$ per lb., and pork $8\frac{1}{4}d.$ per lb.

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REPORT FOR THE YEAR 1894-95
ON THE
BUDGET OF THE GERMAN EMPIRE.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1165.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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GERMANY.

BERLIN.

Sir E. Malet to the Earl of Kimberley.

My Lord,

Berlin, June 19, 1894.

I HAVE the honour to enclose a Report by Mr. Gosselin, Secretary of this Embassy, on the Budget of the German Empire for the Financial Year 1894-95.

I have, &c.

(Signed) E. B. MALET.

Report on the Budget of the German Empire for the Financial Year 1894-95.

ABSTRACT of Contents.

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The budget for the financial year 1894-95 (as fixed by the Budget Law of March 18, 1894), provides for a total expenditure of 64,326,800*£*, comprising (in round numbers):—

Expenditure,
ordinary and
extraordinary.

Description.	Amount.
	<i>£</i>
Ordinary permanent expenditure	53,996,800
Ordinary non-recurring expenditure	3,816,160
Extraordinary expenditure	6,513,760

Revenue.

The Imperial revenue, estimated so as to balance exactly the expenditure, is derived from the customs and other Imperial sources of revenue, the balance being made good by the "Matri-
cularbeiträge" or contributions from the confederated States, supplemented, if necessary, by a loan.

Description.	Amount.
	<i>£</i>
In 1892-93 the expenditure of the Empire amounted to ..	60,861,348
1893-94	63,697,528
1894-95	64,326,800

Comparison
of budgets of
1893-94 and
1894-95.

The following table shows the chief items of expenditure and the corresponding figures for the last exercise.

TABLE showing Imperial Expenditure for 1894-95, as compared with Exercise of previous Year.

Item.	Description.	1894-95.		1893-94.	
		Permanent Ordinary.	Non-recurring Ordinary and Extraordinary.	Permanent Ordinary.	Non-recurring Ordinary and Extraordinary.
		<i>£</i>	<i>£</i>	<i>£</i>	<i>£</i>
I.	Bundesrath (included in H.O. Vote)	...	...	...	...
II.	Reichstag	21,147	...	21,192	...
III.	Imperial Chancellor and Chancery	7,473	3,000	7,673	...
IV.	Foreign Office (including Colonial Department) ..	515,192	224,550	508,785	210,210
V.	Home Office	1,360,652	1,250,763	1,292,075	1,929,895
VI.	Army Administration	24,001,095	6,553,068	22,512,734	9,763,938
VII.	Admiralty and Navy	2,534,806	1,161,342	2,412,734	1,577,212
VIII.	Justice*	103,287	50,000	102,748	60,000
IX.	Treasury	19,096,421	3,076	17,712,942	10,930
X.	Imperial Railway Office ..	6,142	...	15,611	...
XI.	Service of Debt of Empire ..	3,550,930	...	3,450,000	...
XII.	Audit Office	21,124	...	31,494	...
XIII.	General Pension Fund	2,112,294	...	2,230,000	...
XIV.	Imperial Invalid Fund	1,362,924	...	1,200,000	...
XV.	For further carrying out Old Age Pensions System. (New Vote) ..	10,000	...	...	...
XVI.	Posts and Telegraphs	...	434,000	...	400,000
XVII.	Printing Office	...	3,000	...	14,800
XVIII.	Administration of Railways	...	600,287	...	600,440
	Total	53,996,800	10,829,439	51,438,572	14,746,365

* Since the above was written, an additional sum of 520*£*. has been voted (by the Law of May 22, 1894), as a supplement to the ordinary expenditure of the Departments of Justice, which will be met by an equivalent increase of the Matri-
cularbeiträge.

The expenditure of the Bundesrath is included in the Imperial Home Office Vote; there is a special clerk to the Council, whose salary, as such, amounts to 135*l.* a year, the rest of the Council's business is despatched by the officials of the Home Office, without additional remuneration. The members of the Bundesrath are, of course, paid by their respective Governments.

The Reichstag Vote is practically unaltered, it includes a lump sum of 200*l.* as compensation to private railway companies for members' free passes.

The Vote for the Imperial Chancellor and Chancery is the same as last year. His excellency's salary amounts to 2,700*l.*, besides the official residence.

Under the heading of the Foreign Department Budget, which includes the Foreign Office, the diplomatic, consular, and colonial services, there is an estimated increase of nearly 10,000*l.* in the ordinary expenditure, and of 31,040*l.* in the extraordinary expenditure.

This year the ordinary expenditure is calculated at 516,192*l.*, last year it amounted to 506,795*l.*; the extraordinary expenditure this year is calculated at 241,350*l.*, last year it amounted to 210,310*l.*

The Secretary of State receives (besides an official residence) 2,500*l.* a year; the Under Secretary of State, 1,250*l.*; and the three directors for political, commercial, and colonial affairs, 1,000*l.* each. The total expenditure on the Ministry for Foreign Affairs amounts to 99,167*l.*, showing an increase of 3,012*l.* on the Vote for last year.

The Ambassadors at London and St. Petersburg receive 7,500*l.* a year; at Constantinople, Paris, Rome, and Vienna, 6,000*l.* a year; and at Madrid and Washington, 5,000*l.*; in all cases embassy houses being provided by the State.

The Ministers' salaries vary from 3,000*l.* at Peking, Tokio, and Tehran; 2,650*l.* at Rio de Janeiro; 2,400*l.* at Buenos Ayres, to 1,200*l.* at Luxemburg. The total expenditure of the diplomatic service amounts to 138,762*l.*, an increase of 315*l.* on last year's Vote. This sum does not, however, include the expenditure on the Prussian Legations to the Holy See and to the German courts.

The salaries of the 18 consuls-general vary from 2,400*l.* at New York, to 1,000*l.* at Amsterdam, Antwerp, Barcelona, and Genoa. In the British Empire there are German consulates-general at London, Calcutta, Cape Town, and Sydney. The total expenditure on the consular service amounts to 121,337*l.*, showing an increase of 1,400*l.* on last year's vote.

The Cameroons Salaries Vote, entitled "Salaries of the officials in the Colony," amounts to 3,050*l.*, as against 2,862*l.* last year, of which nearly the half (1,500*l.*) goes to the Governor.

The Togoland, South-West Africa, and Marschall Islands Votes remain as last year, the two first at 1,475*l.*, the latter at 1,275*l.*, in each case the Governor ("Kommissär") receiving 900*l.* a year. Official residences are provided for all the officials named in this estimate (13 in all).

Lastly, a Vote of 15,000*l.* is asked for to cover the postage and
(1800)

telegraphic expenses, writing material, newspapers, and other minor expenditure of the department.

Details of the increase and alterations in the Foreign Office Budget are given in the table annexed to this report.

Interior
department.

The Home Office embraces many departments in the sphere of its administration. For instance, the Committees on Emigration, Education, Navigation, and Labour; the Statistical Office; Health Office; Patent Office; Imperial Insurance Office, &c.

The following Votes may be noted:—A sum of 3,100*l.* is granted to the Nürnberg German Museum (an increase of 700*l.* on last year's Vote, the contributions of Bavaria and the city to this national undertaking being proportionately increased).

The Romano-German Museum at Mainz receives 750*l.*

A Vote of 1,000*l.* is granted for the support of German art in foreign exhibitions.

Description.	Amount.
	£
Annual contribution to Paris weights and measures bureau	460
Pay of German members of the above committee	75
Contribution to Cape Spartel lighthouse	60
Subvention to German postal steamship lines with East Asia and Australia	204,500
For German postal service with East Africa	45,000
For precautionary measures against rinderpest along the Russian and Austrian frontiers	27,460
Imperial contribution for insurance against old age and sickness	698,000
Statistical Office Vote	44,119
Health Office Vote	11,906
[An increase of 1,738 <i>l.</i> necessitated by the great additional work thrown on the department. The three divisions of the laboratory, for chemistry, hygiene, and bacteriology, will for the future be controlled by special instructors.]	
Patent Office Vote	70,475

The furnishing and lighting apparatus of the new Reichstag Palace is estimated to cost altogether 63,750*l.*; of this sum 5,000*l.* was voted last year, leaving 58,750*l.* to be furnished this year.

An additional Vote of 20,000*l.* is accorded for decorating the Reichstag with sculptures and paintings.

First instalment for memorial statue to the Emperor William I, to be erected on the Schlossfreiheit, 55,000*l.*

Eighth instalment towards completion of North Sea Canal, 930,000*l.*

War Office
and army.

The Military Budget, a document of 649 pages, is divided into three sections:—

1. The Budget of the Military Contingents of Prussia and of the other Confederated States administered by Prussia.
2. The Budget of the Saxon Military Contingent (forming the 12th Army Corps).
3. The Budget of the Wurtemberg Military Contingent (forming the 13th Army Corps).

The Bavarian army, which retains its autonomous organisation, consists of two distinct army corps, and the details of the Bavarian military expenditure do not figure in the Imperial Estimates.

Description.	Amount.	Cost of the German army.
	£	
The ordinary expenditure this year will amount to.. ..	24,001,095	
Last year it amounted to	22,512,734	
An increase of no less than	1,488,361	

The total cost of the German army, ordinary and extraordinary, and including the Bavarian corps, for 1894-95 is put at—

Description.	Amount.
	£
Ordinary permanent expenditure	24,001,095
Ordinary non-recurrent expenditure	1,916,647
Extraordinary expenditure	4,636,421
Total	30,554,163

The following are the chief items of the ordinary expenditure:—

Description.	Amount.
	£
War Office	125,677
General staff and ordnance survey	120,528
Engineer and pioneer corps,	110,374
Pay of troops	6,926,524
Commissariat	5,335,493
Clothing and equipment	1,411,188
Garrison administration	2,332,264
Medical	420,834
Reserve forces	172,676
Purchase of remounts.. .. .	440,902
Travelling and transport expenses	426,583
Military training schools	336,359
Artillery and arms equipment	1,565,030
Building and maintaining forts	138,923
Lodging allowances	495,077
Contributions to soldiers' widows' fund	124,910

The original military estimates, as laid before the Reichstag, were reduced by about 100,000*l.* during the discussion, the reductions being effected in the Commissariat Vote and certain military buildings.

The naval expenditure is put this year at—
(1800)

A 4 Admiralty
and navy.

Description.	Amount.
	£
Recurring ordinary expenditure	2,534,806
Non-recurring ordinary expenditure	949,782
Extraordinary expenditure	211,560
Total	3,696,148

The Reichstag used the pruning-knife more vigorously on the Naval Estimates than on those of any other department, and, in spite of the protests of the Government, the proposed Vote for a new dry dock at Kiel (first instalment 50,000*l.*) was thrown out.

The following are the chief items of the ordinary expenditure:—

Description.	Amount.
	£
His Majesty's Naval Cabinet and Admiral-in-Chief ..	1,665
Imperial Admiralty	46,747
Pay of officers and men	569,640
Ships in commission	543,640
Commissariat	42,444
Garrison administration	63,130
Travelling and transport expenses	71,685
Maintenance of fleet and dockyard expenditure	760,123
Guns and fortifications	226,037

Shipbuilding
Votes.

The following are the principal items of the non-recurring expenditure:—

Description.	Amount.
	£
Final instalment for armoured ships—	
“Weissenburg”	50,000
“Kurfürst Friedrich Wilhelm”	111,000
“Hagen,” launched on October 21 last, at Kiel, the sixth of the ten cruisers specially built for the defence of the North Sea Canal. Displacement, 3,495 tons; engines, 4,800 horse-power	60,000
[The “Hagen” is built of German steel, and will make her trial trip next July, within 3 years from the time she was begun.]	
Final instalment for armoured ship “Heimdal”	35,000
Third “ ” “T”	60,000
“ ” “V”	60,000
Final instalment for armoured cruiser F	75,760
“ ” aviso H	53,350
Three first instalments for three new ships to replace the “Preussen,” “Leipzig,” and “Falke”	160,000

Votes for
ships' guns.

A sum of 172,200*l.* was asked for the guns for the “Brandenburg,” “Wörth,” and “Kurfürst Friedrich Wilhelm” (fifth instal-

ment); 57,500*l.* as a second instalment towards the guns for the "Hagen" and "Heimdall"; and 62,000*l.* for arming T. and V.

Of the extraordinary naval expenditure the following Votes may be noted:—

Description.	Amount.
	£
Fourth instalment for arming fortresses on the Lower Elbe	41,100
Third instalment for similar works at Wilhelmshaven ..	12,200
For building two new batteries at Wilhelmshaven ..	42,500
For improving harbour of Wilhelmshaven	25,000

The ordinary expenditure of the Department of Justice is put at 103,287*l.* Department
of Justice.

The non-recurrent expenditure amounts to 50,000*l.* for the building operations in connection with the new Law Courts.

The ordinary expenditure of the Imperial Treasury will amount this year to 18,026,421*l.*, being an increase of 313,479*l.* on the figures of last year. Imperial
Treasury.

Description.	Amount.
	£
Disbursements to confederated States out of proceeds of the customs, tobacco, stamps, and brandy duties. . .	17,772,500
Vote for Treasury Department	28,520
Special fund placed at Emperor's disposal for gifts and charities	150,000
Maintenance of Imperial Palace at Strasburg	1,200
Strasburg University	20,000
Compensation for property taken for military purposes near fortresses	16,785
Coinage	5,000
Expenses of customs and excise control	20,650

The extraordinary expenditure consists of only one Vote of 8,070*l.* for acquiring land near fortresses. (See, too, similar Vote in ordinary expenditure.)

The Vote for the Imperial Railway Department amounts to 16,742*l.*, an increase of 101*l.* on last year's Vote. On the other hand, no extraordinary expenditure is to be incurred this year. Imperial
Railway
Office.

The expenditure on the Public Debt Department amounts this year to 3,613,490*l.*, of which the service of the Public Debt absorbs 3,599,800*l.* for interest of the 4, 3½, and 3 per cent. loans, and Treasury bills, &c. Public Debt.

The Vote for the Audit Office amounts to 31,579*l.*; 85*l.* more than last year. Audit Office.

The General Pensions Fund requires a sum of 2,412,271*l.*, divided as follows:— General
Pensions
Fund.

Description.						Amount.
						£
Army pensions (including Bavaria) ..	..	..	..	..	..	2,255,016
Naval pensions ..	..	..	..	..	..	97,784
Civil pensions ..	..	..	..	..	..	59,471
Total ..	..	..	..	..	..	2,412,271

Imperial Invalid Fund. The Vote this year for the Imperial Invalid Fund amounts to 1,362,924*l*. Last year the figures stood at 1,233,603*l*, showing an increase of 129,321*l*, a consequence of the Pensions Law of May 22, 1893.

Old age pensions. This Vote of 16,088*l* makes its first appearance in this year's budget.

Posts and telegraphs. The Posts and Telegraph Administration requires a sum of 434,999*l* for purchase of sites—building new and enlarging existing postal buildings.

Printing Office. An Extraordinary Vote of 3,550*l* was obtained for the Imperial Printing Office, for the purchase of new machinery and printing plant.

Imperial Railway Administration. The extraordinary expenditure of the Railway Administration will amount this year to 630,287*l*, nearly 4,500*l* less than last year. The Vote is mostly absorbed by the new lines in course of construction, 50,000*l* going towards renewing rolling stock.

Estimated Imperial revenue for 1894-95. The estimated revenue for the Empire for 1894-95 is made up as follows :—

Description.						Amount.
						£
From ordinary sources ..	..	..	..	..	..	37,938,163
Contributions from confederated States ..	..	..	..	..	..	19,874,871
Extraordinary revenue ..	..	..	..	..	..	6,513,768
Total ..	..	..	..	..	..	64,326,802

The actual revenue in 1893-94 was :—

Description.						Amount.
						£
From ordinary sources ..	..	..	..	..	..	36,641,186
Contributions from confederated States ..	..	..	..	..	..	19,008,207
Extraordinary revenue ..	..	..	..	..	..	10,876,773
Total ..	..	..	..	..	..	66,521,466

The actual revenue in 1892-93 was :—

Description.						Amount.
						£
From ordinary sources..	..	..	..	..	..	37,097,262
Contributions from confederated States	..	..	..	..	..	16,042,987
Extraordinary revenue..	..	..	..	..	..	7,721,099
Total	..	..	..	..	..	60,861,348

The revenue for the present financial year is therefore estimated at 2,194,664*l.* less than that of last year.

The following table gives the details of the Imperial revenue for 1894-95 :—

DETAILS of Budget of Imperial Revenue for 1894-95.

Item.	Description.	Estimated Revenue, 1894-95.
		£
I.	Customs and excise—	
	(1) Revenue shared by all the Zollverein States :	
	Customs duties.. .. .	17,485,300
	Tobacco duty	554,100
	Sugar tax	3,770,300
	Salt „	2,137,100
	Brandy tax	5,964,050
	(2.) Revenue not shared by Bavaria, Wurtemberg, Baden, and Alsace-Lorraine :	
	Beer tax	1,242,800
	(3.) Revenue from territories outside the Zoll- verein :	
	(a.) Revenue shared by all Zollverein States (as above)	3,054
	(b.) Beer tax, not shared by South Ger- many and Alsace-Lorraine.. .. .	73
II.	Stamp duties—	
	On playing cards	62,750
	On bills of exchange	379,400
	On shares, annuities, and bonds	221,550
	On sales and similar transactions	552,600
	On lotteries (State and private)	452,650
	On statistical fees	33,900
III.	Posts and Telegraph Administration—	
	Gross receipts	13,538,420
	Expenses	12,118,219
		1,420,201
IV.	Printing Department—	
	Gross receipts	312,100
	Expenses	240,260
		71,840
V.	Railways—	
	Gross receipts	3,123,000
	Expenses	1,968,945
		1,154,055
VI.	Imperial Bank	362,240
VII.	Sundry receipts from administrative and other sources	626,958
VIII.	Imperial invalid fund	1,362,924
IX.	Interest on Reichstag Palace building fund	2,300
X.	Stettin fortress: sale of portions of ground	70,015
XI.	Balance from Budget of 1892-93	68,601
XII.	Contributions from confederated States	19,874,871
XIII.	Extraordinary revenue	6,513,768
	Total	64,326,800

Sources of
revenue:
customs and
excise.

The customs revenue is expected to amount to 429,200*l.* in excess of last year's revenue. It is, however, difficult to gather from the averages of the last year's customs revenue any probable indication of the amount of the imports this year. The recent commercial treaties, the last of which (that with Russia) only came into force on March 20 last, have all embodied reductions in the tariff duties, and it remains to be seen what immediate effect this will have on the customs revenue.

It is estimated that the tobacco tax will bring in an increase Tobacco duty. of 7,050*l.* on the amount realised last year.

The sugar tax is expected to show an increase of 450,450*l.* on Sugar. the revenue realised last year, and the salt tax 40,150*l.* more Salt. than last year.

The brandy tax, the revenue of which has been somewhat stationary, if not declining, these last years, brought in 5,888,300*l.* in 1893-94. This year it is calculated that the returns will yield an increase of 15,750*l.*

Of the above sources of revenue all the confederated Governments take a share.

The revenue derived from the beer tax is calculated to exceed Beer. last year's returns by 8 100*l.*

(Bavaria, Wurtemberg, Baden, and Elsass-Lothringen have no share in this beer excise.)

A further decrease in the stamp duties revenue is again Stamp duties. anticipated. Last year they fell off by nearly 30,000*l.* This year a further decline of 123,450*l.* is anticipated.

It is anticipated that the five State lotteries (Prussian, Saxon, Mecklenberg, Brunswick, and Hamburg lotteries) will together bring in a round sum of 390,600*l.*

The duty on playing cards is expected to realise 62,750*l.*

The central administration of the Post Office will absorb this Post Office. year 122,901*l.*, an increase of some 2,500*l.* on the previous years' figures.

The working expenses will necessitate an expenditure of 11,995,318*l.*, which, together with the 122,901*l.* above-mentioned, will make a total of 12,118,219*l.*, leaving a balance to the good on the gross receipts of 1,420,201*l.*

The income of the printing office is estimated this year at Printing Office. 312,100*l.*; the working expenses at 240,260*l.*; leaving a balance to the good of 71,840*l.*

The revenue derived from the Imperial Railway Administration Railway Administration. is estimated this year at 3,123,000*l.*; the working expenses and the cost of the central administration are put at 1,968,900*l.*; leaving a balance to the good of 1,154,100*l.*

The share of the Empire in the net profits of the Bank is Imperial Bank. estimated at 362,240*l.*, an increase on last year's profits of some 6,360*l.*

A sum of 20,879,627*l.* was asked for in the estimates as Matricular-beiträge; contributions of confederated Governments to the Imperial expenditure. originally laid as the amount of the contributions from the Confederated Governments towards meeting the Imperial expenditure. The reductions made by the Reichstag in the Votes somewhat reduced this total, which in the Budget, as passed, amounts to only 19,874,871*l.*

In 1893-94 these contributions amounted to 19,003,207*l.* The ever-fluctuating amount of the Matricularbeiträge is one of the standing obstacles in the path of the German finance administration. The confederated Governments never know beforehand what they are to receive from the Empire, nor what they are to pay towards meeting the Imperial expenditure, and financial

confusion is the inevitable result. The Government have made this session an abortive effort to remedy, or at least to palliate, this state of things, but the financial reforms, which were intended to introduce order into the financial relations of the Empire with the confederated Governments, were all, except the Stock Exchange Taxation Bill, hung up, and the chief part of the additional army expenditure of 2,800,000*l.* will have to be met by increased contributions from the confederated Governments.

Of the total of 19,874,871*l.* matricular contributions, more than half, viz., 11,707,951*l.*, will fall to the share of Prussia; Bavaria following next with 2,516,644*l.*

The extraordinary revenue which last year brought in 10,876,773*l.*, is put this year at 6,513,768*l.*, a falling-off of 4,363,005*l.*

The Prussian Government devote 300,000*l.* towards the construction of the North Sea Canal Works.

Berlin
Seminary of
Oriental
Languages.

In the annexed table showing the details of the increase this year of the expenditure of the Foreign Department, mention will be found (*vide* Section E.) of an additional 112*l.* granted by the Imperial Government to the Berlin Seminary of Oriental Languages, which will now receive an annual subsidy of 2,450*l.*

This seminary, attached to the Berlin University, was opened in October, 1887, and memoranda are annexed to the Foreign Office estimates, both last and this year, showing the work accomplished by the seminary during the first 6 years of its existence, 1887-93.

General
regulations as
to admission.
Fees.

By the general regulations for admission, every candidate must be regularly matriculated, or have received a visitor's license from the Rector Magnificus of the University. Students attending a series of lectures must pay an entrance fee of 5*s.* for each half year, and for each separate course (*e.g.*, students following two courses, on Chinese literature and Chinese geography, would pay 10*s.* the half year). They likewise pay each half year 1*l.* towards the seminary library, for the preservation and purchase of books and maps.

Otherwise the course of instruction at the Oriental Seminary is gratuitous.

Special
regulations as
to admission.

Besides presenting the customary documents as to their previous examinations, &c., the students must inform the director what subjects they desire to take up, and whether they propose to enter the Imperial Service as Dragomans, or have other objects in view. The number of students attending each course is limited, generally to 12.

The following regulations have been drawn up by the Ministry for Foreign Affairs for the student-interpreters studying at the seminary.

Candidates must have besides a general education a thorough practical knowledge of English and French, and, as a rule, must have passed the first law, "Juristen," examination. They must be of sound constitution, physically qualified for service in tropical climates, and have served in the army.

If the candidate can fulfil all these conditions, and there is a vacancy, he is accepted on the understanding that, on the termination of the course, he will serve the Empire for at least 10 years, or should he resign within that period, that he repays the cost of his education.

No candidate has a claim for a definitive appointment in the Imperial Service on the ground of his admission to the seminary, but students who have passed through the seminary shall have the preference over other candidates.

The following diplomas have been given since 1889 :—

				Student in—	Number.
Summer half-year, 1889	..	..	Modern Arabic	.. ..	4
			Turkish	.. ..	5
			Hindustani	.. ..	2
Winter half-year, 1889-90	..	..	Turkish	.. ..	1
Summer half-year, 1890	..	..	Chinese	.. ..	3
			Japanese	.. ..	2
			Persian	.. ..	1
			Arabic	.. ..	1
			Turkish	.. ..	3
Winter half-year, 1890-91	..	..	Swaheli	.. ..	4
			Turkish	.. ..	1
Summer half-year, 1891	..	..	Swaheli	.. ..	1
			Chinese	.. ..	1
			Japanese	.. ..	3
			Arabic	.. ..	2
Winter half-year, 1891-92	..	..	Swaheli	.. ..	2
			Arabic (Syrian)	.. ..	1
Summer half-year, 1892	..	..	Chinese	.. ..	1
			Arabic (Egyptian)	.. ..	3
			Swaheli	.. ..	2
			Persian	.. ..	1

It has not yet been found possible to carry out fully the recommendations of the Legislature in 1891-92, which aimed at giving to those students who wished to take practical advantage of their knowledge in languages by starting life as merchants, missionaries, artisans, or explorers in Asia and Africa, instruction on subjects which, though universally recognised as necessary, are, nevertheless, not imparted in any school. Such as a knowledge of the commercial relations of the present and immediate past, details of tariffs, money exchanges, navigation, maritime law and insurance, commercial statistics and geography, the sanitary essentials of tropical climates, medical instruction for use in cases of emergency, a knowledge of the products (especially of the vegetable kingdom) which China, Japan, South Asia, and Africa have to dispose of, and last, but not least, instruction in taking scientific measurements, sea-levels, fixing degrees of latitude and longitude, and noting climatic observations.

The seminary further undertakes to translate official and private correspondence (for a pecuniary consideration in the latter case).

During the first 5 years of the existence of this excellent institution no less than 853 students received instruction in the regular course of lectures, and private instruction was given, in addition, to 79 students of modern Greek, 78 of Spanish, and 3 of Russian, 160 in all.

It is specially recommended that students should enter the seminary early in life ; and attention is called to the age limit fixed for candidates for interpreters' appointments in the British and Dutch Services ; a certain amount of legal knowledge is also declared to be a desideratum.

The additional subsidy of 112*l.* is granted this year, in order that instruction in the Russian language shall be added to the official curriculum of the seminary.

The total cost of the new chair will be 225*l.* per annum, half being paid by the Empire and half by Prussia, the Imperial grant will be only accorded on the express condition that the Prussian Treasury agree to bear their share of the expenditure.

Foreign Office Budget.

Table showing details of increased expenditure of Foreign Department.

This Vote (including the Foreign Office, the Diplomatic, the Consular and Colonial Services of the Empire) shows an increase in the ordinary expenditure of about 9,400*l.* as compared with last year's budget, accounted for as follows :—

A. FOREIGN OFFICE.

Description.	Amount.
	£
Salary of Colonial Director (a new appointment rendered necessary on account of increase in work and importance of post)	1,000
Salary of additional acting councillor	435
" permanent assistant clerk	285
" seven new subordinate officials (150 <i>l.</i> each)	1,050
" additional servant	60
Increase of house allowances	507
" sundry personal allowances (<i>e.g.</i> Sunday work, cypher work, &c.)	450
	3,787
Deduct decrease for messengers and travelling expenses ..	700
Total increase in ordinary expenditure of Foreign Office	3,087

B. DIPLOMATIC SERVICE.

Residence.	Description.	Amount.
		£
Berne	Salary of 2nd chancellor, rendered necessary by the increased work caused by the Treaty with Switzerland	225
Brussels	Salary for 2nd chancellor, 5,000 marks .. Increase for 1st chancellor, 600 marks. . [It is stated that the work of the Brussels Legation in the last decennial period has nearly tripled itself.]	280
Constantinople ..	Salary for 2nd chancellor, 4,800 marks .. Increase to salary of 1st Dragoman, 1,100 marks [Since 1880, the correspondence of the Constantinople Embassy has doubled itself.]	240 55
Hague	Salary of a 2nd chancellor, 5,000 marks .. [Here again, the work has tripled itself since 1880.]	250
Pekin	Salary for a 2nd interpreter, 9,000 marks (besides free quarters)	450
Rio	Increase of Minister's salary, 5,000 marks .. ,, 1st secretary's salary, 1,000 marks .. ,, chancellor's salary, 1,000 marks .. [These augmentations are explained by the increased cost of living at Rio, and by the necessity of living outside the town, on account of the insanitary condition of the capital.]	250 50 50
Rome	Increase of Ambassador's salary Salary of 2nd chancellor (and free quarters) ..	1,000 90
Stockholm ..	Increase of chancellor's salary [Prices are said to have risen from 10 to 20 per cent. since 1886]	20
	Total	2,960
	Deduct rent allowance for Madrid Embassy (a house has been purchased by the Govern- ment)	1,000
	Total increase	1,960

C. CONSULAR SERVICE.

Residence.	Description.	Amount.
		£
Constantinople ..	Salary for 2nd Dragoman at consulate-general	240
Sofia	Increase of clerk's pay	25
Copenhagen ..	"	50
Naples	"	25
St. Petersburg ..	Salary for 2nd Dragoman	300
Rotterdam ..	Increase in consul's salary	75
Rotterdam ..	" clerk's pay	15
Stockholm ..	" head clerk's pay	20
Stockholm ..	Salary for 2nd clerk	200
Tientsin	Clerk's salary	225
Tunis	"	225
	Total increase	1,400

D. COLONIAL SERVICE.

	Description.	Amount.
		£
Canneroons ..	The governor's second secretary hitherto managed the post-office, and received half his salary from that department; since the telegraph has been laid, the two appointments have been separated, and the two secretaries receive each 7,500 marks from the Foreign Office, the post-office paying for their own official increase in estimate is half 7,500 marks	187

E. GENERAL FUND OF FOREIGN OFFICE.

Description.	Amount.
	£
Increase in Vote for Berlin Oriental Seminary towards founding a Russian Professorship	112
Increase in donation to the Archæological Institute, for salaries of four secretaries, two in Rome and two in Athens	224
[The whole Vote now amounts to 6,200£.]	
A miscellaneous Vote (known as the Foreign Office Extraordinarium) comprising a variety of subjects, such as rewards for bravery at sea, extra remuneration for officials not connected with the department, journees, expenses, and allowances to members of the Colonial Council, amounts this year to 15,000£. instead of as last year 12,500£, an increase of	2,500
Total	2,836

SUMMARY OF TOTAL INCREASE IN ORDINARY FOREIGN OFFICE EXPENDITURE.

Description.	Amount.
	£
Foreign Office	3,087
Diplomatic Service	1,960
Consular Service	1,400
Colonial Service.	187
General Foreign Office Fund	2,836
Total	9,470

The extraordinary Foreign Office expenditure is estimated at 241,350£, an increase of 31,040£. on the similar Vote in 1893-94.

The following are the items of the extraordinary budget:—

FOREIGN OFFICE EXTRAORDINARY BUDGET, 1894-95.

Description.	Amount.
	£
Subvention to Dr. Dohrn's zoological stations at Naples (unaltered)	2,000
Subvention to scientific discoveries in Central Africa and other lands (unaltered)	10,000
South-West African Protectorate Vote, 1,000,000 marks ..	50,000
[This vote is augmented by no less than 732,700 marks (36,635 <i>l.</i>)]	
East African Vote, 3,500,000 marks, showing an increase on last year's vote of 1,000,000 marks (50,000 <i>l.</i>)	175,000
Last instalment for addition to Foreign Office building, a decrease of 2,150 <i>l.</i> on last year's Vote	3,850
Subvention to the zoological station at Rovigno, in Istria (unaltered)	500
[This station is in connection with the Berlin Aquarium; the manager undertakes to present to the German universities living and preserved specimens at cost price, and to house and furnish material to two German scholars, free of cost, in return for the State subvention. The fauna of the Adriatic, especially off the Istrian coast, is known to be exceptionally rich.]	
Total extraordinary budget	241,350

Last year's extraordinary expenditure included votes for the purchase of a Consulate at Galatz, and Embassies at Washington and Madrid; no such exceptional expenditure is to be incurred this year, and the increase of over 30,000*l.* is due to the additional grants voted for German South-West and East Africa.

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GERMANY.

REPORT FOR THE YEAR 1892
ON THE
TRADE, &c., OF HAMBURG.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 829.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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GERMANY.

HAMBURG

Consul-General Dundas to the Earl of Kimberley.

My Lord,

Hamburg, June 20, 1894.

I HAVE the honour to inclose herewith to your Lordship a Report upon the Trade and Commerce of Hamburg and neighbouring Ports for the year 1892, which is the latest year for which complete data are available.

This Report, the preparation of which has been a labour of several months, is prepared from material, the collection of which occupied nearly the whole course of last year, will I think be found to contain much matter of interest and to indicate faithfully the actual condition and development of German trade. It must be remembered that that trade presents no startling features and does not offer any new and undiscovered markets. It is rather a record of steady progress at home, and patient but persistent push abroad. But a study of this progress will I think afford subject for reflection to those interested.

As the great emporium of the Empire and its principal artery, Hamburg affords the surest gauge of the ebb or flow, the prosperity and development of German Trade and Commerce, and the facts set forth in the accompanying Report are more than a record of fluctuating prices.

I may add that hardly any material is to hand as yet for 1893, but the past year will not, I think, be found to differ very materially from the preceding one.

I have, &c.

(Signed) CHAS. S. DUNDAS.

*Report on the Trade and Commerce of Hamburg and neighbouring
Ports for the Year 1892.*

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General Review.

In reviewing the year 1892 in relation to the trade and commerce of Hamburg it is not possible to approach the subject without first of all taking into consideration the terrible visitation of cholera, which within three months not only claimed between 8,000 and 10,000 victims, but affected as severely by its baneful effects commerce and almost every kind of industry, causing for the time being, and leaving behind it as a mournful legacy, great distress and dislocation of trade. And I think that even in a report of this description I may so far digress as to bear a sincere testimony to the bearing of the people of Hamburg.

Though there was sorrow and grave anxiety on most faces, there was not the least symptom of craven panic or hysterical excitement. They were face to face with the enemy, an invisible, swift, unsparing, deadly foe, but there was the manly resolve to grapple with him, and, if possible, to vanquish him.

But it was not only by the immediate effects wrought on the spot that Hamburg suffered through cholera, but the damage was more far-reaching.

The damage inflicted on trade and navigation through the quarantine regulations, too often utterly useless, which were established in European and transatlantic countries, stopping all

intercourse with vessels, individuals, and merchandise coming from the stricken port, surpassed even the harm done locally. These calamitous influences might well have been dispensed with, for during the first half of the year 1892 the course of business must be described as sluggish, and it was only at the beginning of the second half that a revival of activity was apparent, which was extinguished by the outbreak of the epidemic. Had it not been for this a more flourishing report on the state of trade in general for the year would have been the result, because several branches of the world's commerce showed undoubted signs of improvement in comparison with the depressed state of affairs prevailing at the beginning of the year. The poor crops of 1891 had been followed by very satisfactory ones in 1892 in Germany.

These, however, were, as regards some branches, but a doubtful boon, for growers of fruit and vegetable were heavy losers through the epidemic, the fruit in many places being left to fall from the trees because there was no market for it. The advantages to commerce from a continuance of peace throughout Europe, and the settling-down of political and financial troubles which had caused disturbing influences in some countries, were in a measure neutralised by others of an unfavourable character. The financial policy of the United States and the crisis in Portugal, the bad crops, and the cholera in Russia, and commercial questions pending with other countries, caused uncertainty, hampered commercial transactions, and prevented the tide of prosperity from flowing freely.

In spite of these influences there can be no doubt, however, but that if there had been no cholera epidemic, trade would have been more brisk.

It was only in the closing months of last year, when the depression and many hindrances raised by the cholera were disappearing, that trade had an opportunity of improving.

On the whole, owners have no cause to congratulate themselves. From beginning to end the year must be set down as a bad one. The extraordinary low rates of freights precluded any profits, and newly-established lines suffered especially from this circumstance.

Shipping.

For the first time for many years a decrease in shipping has to be noted. But how entirely this was owing to cholera is shown by the facts that the tonnage had increased in comparison with the corresponding periods in 1891 by 138,000 tons up to the end of June; in July a further 73,000 additional tons; and in August still another addition of 1,000 register tons. But in the course of September there was a falling-off of 190,000 tons; in October 109,000 tons; and in November 32,000 tons; so that at the close of the year a total decrease, although not a very important one, of 123,359 tons had to be recorded.

(1812)

A 3

Annexes A
and B.

The number of sea-going vessels which entered in 1892 was 8,569, with an aggregate tonnage of 5,639,010 register tons, compared with 8,673 ships and 5,762,369 register tons in 1891.

Of the total of 8,569 vessels in 1892, 3,226, with a tonnage of 2,222,463 tons, came from British ports, against 3,322 vessels and 2,337,887 tons in 1891. And the number of British vessels alone in 1892 was 3,172, with 2,636,759 tons, against 3,224 ships and 2,632,447 tons in 1891. By far the largest half of the decrease in 1892 is accounted for either by British vessels or British ports, and if this inquiry be carried further it will be found that the decrease is almost entirely in the coal ships, being 110,000 tons less in that class alone.

The foregoing relates to the port of Hamburg alone, but the contiguous port of Altona can hardly be left out of account in considering the trade of Hamburg, because many vessels discharging there bring goods to consignment of Hamburg merchants. In 1892, 929 sea-going vessels, of 257,983 register tons, of which 246 were steam ships, with 184,812 register tons, entered the port of Altona.

In Hamburg Harbour the total amount of shipping which entered and cleared with cargoes by sea in 1892 amounted to 900 ships and 134,466 register tons.

The total amount of shipping sea-going in the three ports of Hamburg, Altona, and Harburg, the three being so close together that they might almost be regarded as one port (for to get to Hamburg a ship must pass through Altona, and through both Altona and Hamburg to enter Harburg), was in 1892 9,739 ships and 5,962,783 register tons, compared with 9,913 ships and 6,150,637 tons in 1891.

The most important part by far of the shipping traffic of Hamburg is that with Great Britain, which alone amounts to 10 per cent. more than the entire shipping of the sister and rival port of Bremen.

Of the shipping traffic between Hamburg and countries outside of Europe the most important is that with South and Central America, which has advanced considerably. That with Australia and Africa during the past year has not made much progress.

In the last five years the fleet of Hamburg steamship lines has been doubled and been organised into regular lines, having developed and extended the trade to an extent not yet fully realised by outsiders, who fondly imagine that things are as they were, and they cannot be touched. For it is quite impossible to get the average British merchant of to-day to recognise that the German is crowding on all sail, and effectually too.

The performances of the Hamburg-American Packet Company alone, both in the passenger and cargo traffic, stand out conspicuously as demonstrating what German energy and perseverance and excellent management have accomplished in the promotion and extension of German commerce and intercourse in a field that was considered all our own.

Notwithstanding that German shipping interests have not

been able to get along altogether without the subsidising policy, the shipping trade nevertheless stands upon a more independent and robust footing than the mercantile navies of France, the United States, or almost any other country, Great Britain alone excepted. It, of all, more nearly resembles our own, which may be characterised as an industry dependent upon its own efforts, its own resources, and thereby surmounting unaided all difficulties.

Germany is now—I believe it may be asserted without fear of contradiction—second only to Great Britain in steam navigation, possessing 980 steamships, owned by 45 companies and ship-owners.

The following, and—with, perhaps, the exception of the North German Lloyd—the most important, belong to Hamburg:—

	Number of Vessels.	Tons.
Hamburg - American Packet Navigation Company	54	165,000
Hamburg-South American Packet Navigation Company	26	54,250
German steamship owners ..	16	23,100
Kosmos line	15	37,800
Woermann line	13	16,500
Hamburg-Pacific steamship line..	10	12,000
Sloman	..	..
Australian	8	17,257

The British shipping, if we put aside the deterring effects of British cholera, has still held its own, though it does not increase much, and has also both in the number of ships and tonnage maintained its percentage.

That it does not increase much is not to be wondered at. Rather the wonder is that with the great increase in recent years of German shipping, our own has not fallen more conspicuously behind.

In 1890 the number of British vessels which entered were 3,053; in 1891, 3,224; and in 1892, 3,172. Making allowance for the unusual epidemic of the last year, it is evident that in the ordinary course of things there would again have been an increase.

If the tonnage is taken as a test the results will be found to be even more favourable:—

Year.	Quantity.
	Tons.
In 1890	2,348,393
1891	2,632,447
1892	2,636,759

River and
inland
shipping.

A third and final test that British shipping has not lost ground is to be found in the fact that the number of vessels which have arrived in ballast has declined.

The prejudicial influences which operated adversely against the sea-going traffic acted similarly upon the river craft, and unfortunately too, as this industry is one which is greatly impeded if not altogether stopped during the winter, just at the very time of year when it is most active. The renewed business of the closing months could not make up for the loss of the most profitable ones.

That the traffic inland is an important and extensive one is manifest when it is mentioned that the navigable waterways of Germany extend over 8,125 miles, of which 1,875 are canals, and the tonnage of goods carried over them attains to an almost incredible figure.

By means of the chain or cable steamers the barges, capable of carrying hundreds of tons of goods, disperse the sea-borne merchandise to the utmost limits of the Empire and beyond.

From Hamburg the highways for this traffic are the Elbe, the Saale, the Havel, and the Oder. The total figures of the craft engaged in this trade amount for Hamburg and Altona together to 12,618, with a tonnage of 2,625,772 tons, giving employment to 48,149 souls, and the quantity of goods transported amounted to 1,368,600 tons.

Trade.

Importation
and
exportation.
Annexes C, D,
E, F, G, H,
and I.

During the first half of 1892 trade may be described rather as sluggish than depressed. It wanted life, which came with the beginning of the second half, to be unfortunately checked almost before it had attained any vigour, by the epidemic.

The figures under these heads show that in spite of the unfavourable conditions it had to contend with during the year 1892 the volume of importation by sea exceeded that of the previous year, from which it may be argued that it was rising out of the state of depression which had existed while the exportation fell off, which is easily accounted for by the cholera epidemic.

The importation, however, from the interior showed a not inconsiderable decrease, while on the other hand, the exportation inland a noticeable increase. This is partly to be explained by the fact that if more merchandise entered the port seawards, naturally more must find its way out again landwards. And partly, that if owing to any restrictions and hindrances caused by quarantine regulations in other lands, exportation was harassed, naturally instead of a certain quantity being re-exported by sea, the surplus finding its outlet thus checked would seek a market in or through the interior.

Again, if these two branches of commerce are considered according to the values, it will be found that in each case, both by sea and the interior, there was a very considerable decrease, amounting in the importation to as much as 7,773,300*l.*, and in

exportation to 6,005,960*l*. The question arises, "What is this decrease in value owing to?" It is not easy, except for an expert who makes the subject his study, to explain. It may be owing to many causes, harvests, overstocking, epidemics, &c., but probably the most reasonable explanation may be looked for in the increased production of the world, which tends to bring down the value of any article of which there is abundance and to spare. In the four complete years 1889, 1890, 1891, 1892, since Hamburg entered the Zollverein, the volume and value of the importation has risen from 61.9 per cent. to 64.2 per cent. and from 52 per per cent. to 57 per cent. respectively of the whole. In 1892 the value of the exports by sea decreased by 14.8 per cent. compared with the previous year, while the volume decreased by nearly 11 per cent.

There was a marked decrease in the volume and value of both the importation and exportation of the United Kingdom in 1892 compared with 1891, and this applied equally to the whole of the British possessions, as will be seen from the annexed tables. Whether this was due mostly to the depressed condition of trade generally or to the malign influences of cholera in 1892, it is not easy to determine.

Both played a part, but I am decidedly of opinion that it was due chiefly to the latter, because in the year immediately preceding, the figures had been steadily ascending. The plain fact that the falling off in ships was solely attributable to cholera and not to trade, leaves little room for doubt as to which was the more paralyzing in its effects. Looking at all other countries, however, it is very evident that, all things considered, Great Britain has fully maintained her position, and the only foreign competitor which made any considerable advance in 1892 is North America, which increased her importation by 353,920 tons compared with 1891, which year, however, was also below 1890 by about 68,759 tons, although the value in this last mentioned year was considerably below that of 1891.

Taking the importation under the five classified heads of articles of consumption, building material and fuel, raw material and half fabricated articles, textiles and industry and art productions there was a remarkable increase, not less than 7,920,964 cwts. and 1,220,542*l*. in the first named only when compared with 1891, but in the other four classes a correspondingly large decrease, amounting altogether to 6,662,877 cwts. and 2,799,870*l*. The difference here in values may seem disproportionate, but it is accounted for in the raw stuffs and semi-manufactured class of articles, the value of which alone is far in excess of the articles of consumption, while the other three classes all rank higher in value than the first named.

An analysis of the statistical tables shows that the increase in the importation of articles of consumption lay for the most part in grain, chiefly wheat and maize.

The importation from Great Britain amounted to 42,375,830 cwts. valued at 18,313,529*l*., about two-fifths of the whole importation compared with 47,519,061 cwts. and 19,225,434*l*. in 1891.

British
importation
and
exportation.
Annexes F.
and G.

Although the volume has not materially altered in the 5 years from 1888 to 1892, the value has decreased considerably by upwards of 2,000,000*l*.

In the same period the quantity and value of the goods exported to Great Britain was 15,627,389 cwts. and 18,234,900*l*., against 15,984,236 cwts. and 19,039,100*l*.

In most articles there was really a decided increase over the previous year, and had it not been for the considerable falling-off in the quantities of sugar and potatoes shipped to Great Britain in 1892, the slight decrease apparent would have been reversed.

Taking the unfavourable character of the year into consideration this result must be regarded as satisfactory.

Of British possessions, such as British North America, Malta, Singapore, East Indies, Australia, New Zealand, trade showed a decidedly upward tendency.

Principal Articles of Importation.

Coffee.

The importation has shown a steady development, demonstrating that Hamburg has attained a prominent position in the European coffee market. The importation amounts to 2,638,034 cwts., Brazil and Guatemala being by far the principal contributors. British East India and Singapore showed also very large increases, amounting for the former to nearly five times and for the latter nearly double the quantity received in 1891. Some 787,922 cwts. were exported, the bulk going to Sweden, Norway, Denmark, Trieste, Russian Baltic ports, and Bremen.

Tea.

The importation of this article also was satisfactory, larger quantities of Indian and Ceylon were imported than in the preceding year. The export was comparatively trifling.

Coal.

The coal trade was very quiet during the first 9 months of the year. After the disappearance of the cholera great activity set in; so much so that the month of November shows the highest figures ever reached in the importation of this article. The proportion of German to British coal was about the same as in previous years.

The Westphalian coal market was in a very depressed condition throughout the year, and colliery owners sustained actual losses, with the result that for the purpose of remedying such a state of affairs a coal syndicate was formed in order to control prices and production. Both of British and Westphalian the importation was considerably reduced, that of the former amounting to 1,657,621 tons against 1,862,767 tons in 1891; and the latter to 903,185 tons against 833,750 tons.

Sugar.

The trade was hampered by the struggle between German manufacturers and American buyers, which drove the latter to seek supplies in colonial production and so causing the accumulation of large stocks. This naturally resulted in heavy shipments to the United States with but little profit to the Hamburg market. Transactions in refined qualities showed an increase, to which the

erection of a new sugar refinery at Schulan largely contributed. The export to northern countries was greatly crippled by the cholera epidemic, so much so that orders which had already been given were withdrawn, and goods which had been despatched were refused at the place of destination, thus becoming unsaleable and causing a total loss. On the other hand the export to Transatlantic places was very satisfactory.

Large sales were effected in Chile, and considerable orders were executed for the Argentine and Brazilian Republics; but to Eastern Asia the trade suffered in consequence of the depreciation in the price of silver. A few words here in regard to the growth and manufacture of this article may not be uninteresting.

German sugar is manufactured entirely from beet-root which is cultivated by farmers who have an interest in the sugar factories. The average yield of sugar in the beet is from 14 to 15 per cent., and in order to secure a good yield the roots destined for culture are selected solely with regard to the percentage of their yield of sugar. Therefore the excellence of the root in regard to yield and the production of the seed is a matter of the first importance. The plant most in demand is the little Wanzleben.

The factories consume 200 tons to 1,000 tons of beet-root daily, according to size or working capabilities.

The process is as follows:—The roots cut into strips are edulcorated with warm water, and the juice thus obtained is clarified by means of lime. The residue left is then subjected to a process by which all moisture is extracted by means of presses and utilised as provender, which has been found very serviceable. A second and third purification with carbonic and sulphurous acid follow; and the syrup and crystallisation operations by evaporation and boiling give the final production of the manufactured article which is separated by centrifugal machinery from the syrup. The deposit left from this process is the molasses which is so much used in the manufacture of spirit. The number of factories in Germany in 1891 was 406 equipped with 4,717 steam engines of 68,691 horse power, using up 10,623,319 tons of beets, and yielding 24,273,784 cwts. of sugar, and 4,815,922 cwts. of molasses.

The following figures give the quantity exported:—

Articles.	1892.		1891.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
Raw sugar	7,097,584	5,232,067	8,732,530	8,321,936
Crystallised sugar ..	2,372,106	2,034,994	3,040,276	2,851,274
Refined „ ..	3,025,012	2,734,083	3,183,502	2,905,645

of which Great Britain absorbed in—

Articles.	1892.		1891.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
Raw sugar	4,254,186	3,119,876	3,041,630	2,210,322
Crystallised sugar ..	2,235,944	1,919,340	2,558,356	2,511,566
Refined " ..	2,430,346	2,157,232	2,660,850	2,413,476

Spirits.

By spirit must be understood the pure production of alcohol obtained from potatoes, not what we understand by spirits as meaning brandy, rum, &c. A great check was given to the refineries by the prohibitive measure of the duties in Spain.

German spirit is a purely agricultural product obtained by distilling from potatoes by the cultivators. This fact makes its influence felt in the matter of taxation. Certain advantages are accorded the distilleries in proportion to their agricultural operations, but the smaller ones enjoy considerable advantages. As in the case of sugar great attention is paid to the cultivation of potatoes producing a very high percentage of starch. This industry is prosecuted under chemical and highly scientific methods, and to the perfect system of fermentation which has been attained this industry owes its prosperity. The "mash," which is the residue after being subjected to distillation, still yields a profit, as it forms a valuable fodder for cattle.

The total production of spirit was in :—

Year.						Quantity.
						Gallons.
1892..	..	..	..	..	..	3,542,110
1891..	..	..	..	..	..	6,641,250

The principal consumers were the West Coast of Africa, Great Britain, Spain, and Japan in the following quantities :—

Country.	1892.		1891.	
	Quantity.	Value.	Quantity.	Value.
	Gallons.	£	Gallons.	£
West Coast of Africa ..	676,874	43,920	615,472	44,916
Great Britain	504,702	45,528	442,926	46,213
Spain	482,636	53,476	3,587,320	372,530
Japan	463,342	59,741	389,400	40,681

From the above figures it will be seen to how great an extent the new prohibitive duties in Spain affected the export to that country. And further, some idea may be formed of how large a proportion potato cultivation bears towards the whole agricultural industry of Germany, when it is mentioned that, in addition to the enormous quantity which must be used in the manufacture of the quantity of spirit produced and in supplying the needs of the population, some 163,704 cwts. were exported to Great Britain in 1891.

The bulk of this article is supplied from British East Indies Rice. and Singapore.

Business on the whole was bad throughout the year. The prices realised for sales left little or no profit on the purchase prices, and the heavy importation—Saigon alone exported 165,000 tons—kept down any attempt at bolstering up high prices. And when the epidemic broke out trade stopped altogether.

The quality of Burmese rice is said to have been rather poor; and that from Java, which at first was considered satisfactory, afterwards turned out badly. The shipments from Calcutta were of satisfactory quality.

The principal sources from which Hamburg draws her supplies are first and chief of all the British East Indies, after which come Bremen, French East Indies, and Japan.

Singapore contributed a not insignificant portion considering that not a grain arrived from there in 1891.

The total quantity imported amounted to 2,774,245 cwts., valued at 2,180,122*l.*, and the following table shows the principal countries whence imported:—

Country.	1892.		1891.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
British East Indies ..	1,456,632	570,090	1,312,000	515,027
Bremen.. ..	667,475	344,691	662,324	310,464
French East Indies ..	306,150	100,737	..	..
Japan	248,656	134,778	505,336	277,202
Singapore	35,090	13,332	..	..

In this article Singapore and British East India exhibited a Tobacco. remarkable advance, for whereas in 1891 no importation of tobacco arrived from either, in 1892, 6,024 cwts. of the value of 12,309*l.* was received from the former, and 3,672 cwts. valued at 14,460*l.* from the latter. In comparison with Brazil, North America, exclusive of Canada, St. Domingo, the Netherlands, the importation from all other countries is insignificant.

A very considerable amount comes in through Bremen.

The disturbing apprehensions regarding projected additions to the duties exercised an unfavourable influence upon trade generally, keeping it in an uncertain and hampered condition.

Both the importation and exportation were very far below that

of 1891, and notwithstanding that a considerable quantity of tobacco enters Hamburg by way of Bremen, an exceedingly large quantity, fully two-thirds of the whole exportation of raw tobacco from Hamburg finds its way to Bremen. Of cigars, Australia and Norway are by far the largest consumers, taking between them nearly one-third of the whole exportation, after which the Cape, Great Britain, Chile, and Portugal come in order of rotation in nearly equal quantities.

The following are the total figures of the exportation in:—

Articles.		1892.		1891.	
		Quantity.	Value.	Quantity.	Value.
Raw tobacco	Cwts. ..	261,822	£ 727,893	402,562	£ 1,014,024
Cigars	Number	44,126,000	122,281	48,872,000	184,926

It is curious to note that the average price of the raw tobacco was about 6*d.* per lb., and the cigars $\frac{1}{2}$ *d.* each.

Cotton.

The importation from British East India, Great Britain, and British possessions, although not quite up to that of the preceding year, nevertheless exceeded the half of the whole importation.

The following comparative table shows the import from the principal countries:—

Country.	1892.		1891.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
British East Indies ..	824,524	1,488,970	884,380	2,008,178
Great Britain	252,516	452,764	255,046	506,011
Australia	1,008	2,726	378	931
British North America	280	588	4,206	10,022
United States	640,006	1,347,028	641,908	1,619,038
Egypt	68,504	184,501	24,262	53,318

In all cotton manufactured goods, though the importation in all descriptions was considerably below the figures of 1891, Great Britain far outstrips other countries in the statistics, and where there has been a falling-off in any one class I cannot discover that the deficiency was made good by another country taking the market.

The exportation of the raw material was not considerable, and was principally to Bremen. Cotton yarn also was not great and nearly all to Great Britain.

There was, however, a marked increase, some 56,894 cwts., in the exportation of textiles directed chiefly to the Brazilian, Chilean,

and Argentine Republics, to Madagascar, Roumania, and Japan, representing a trade of 1,250,000*l*.

Hamburg has attained to a position of considerable importance ^{Jute.} in the jute trade, owing to its exceptional situation commanding ^{Annex H.} the great waterway leading through the heart of Germany right into Bohemia.

Not only are the majority of the German mills dependent upon the port of Hamburg for their jute supplies, but also the mills in Bohemia and Austrian Silesia, in consequence of the far cheaper means of communication offered by the River Elbe as compared with railway transit from Trieste and Fiume; for the same reason the mills in Russian Poland also find it more profitable to draw their supplies viâ Hamburg, the jute going forward by the Elbe, the Havel, the Spree, the Spree and Oder Canal, and the Oder.

With the rapid growth of the jute industry in Germany and Austria, the imports of jute at Hamburg show a steady rise year by year, and have reached a figure nearly equal to that of London itself, and Hamburg bids fair at no distant date to outstrip London, and, as a jute port, to occupy a position second only to that of Dundee.

It has naturally been the aim of Germany of late years to encourage as much as possible in this, as in other materials, direct shipments to German ports, and this has led to an astounding increase in the quantity of jute imported into Hamburg by vessels coming direct from India, and a corresponding decrease in the supplies formerly drawn from Great Britain, which must mean a great loss to the British ports concerned, especially London.

In 1884 there was no direct import, and supplies from Great Britain amounted to 18,678 tons, whilst in 1891 the direct import had reached the high figure of 67,893 tons, and supplies from Great Britain had decreased to 9,600 tons.

The annexed table shows the imports of jute at Hamburg from India direct, and from Great Britain; also, for the purpose of comparison, the quantities imported at Dundee and London, as well as the total import for Europe for the last 10 years. It will be seen there was a general falling-off in the quantity of jute imported into Europe, which is attributable to the failure of the crop of the season 1891-92 and the consequent dearth of jute, which by the beginning of 1892 had risen to famine prices.

It may be of some interest to mention here that there are now two German lines of steamers between Calcutta and Hamburg; each with two departures monthly, thus establishing a regular weekly service between the two cities.

Although these have obtained a fair share of the jute shipments to Hamburg, yet a great quantity of the jute arriving here direct from India is still carried in British bottoms.

In this district there are two jute mills, one at Schiffbek, near Hamburg, and one at Harburg, in Prussian territory, having together about 13,000 spindles and 800 looms, employing about 2,700 hands with a yearly consumption of 11,800 tons.

The number of spindles and looms in jute works in Germany

alone amount to 89,660 spindles and 4,280 looms, with a total yearly consumption of 80,700 tons when working full time.

In former years the German jute trade suffered from over-production, and consequent keenness of competition for orders; this state of things has now been remedied by the formation of a jute syndicate to which all the German works of any importance belong, and whose chief object is to control the production in such a manner as to regulate the supply to the demand, and thus enable the different manufacturers to obtain profitable prices for their goods.

In this they are materially assisted by the heavy protective duties on jute yarns and manufactures coming into Germany, viz., 2*l.* 10*s.* per ton on coarse yarns, 4*l.* per ton on fine yarns, and 6*l.* per ton on cloth and bags. The duty levied on bags brought into the country for the export of German produce (chiefly sugar) is, however, remitted if the customs regulations *re* identification have been complied with.

Trade in 1892 suffered from the effects of reduction in the number of working hours, over-production, and keen cutting in prices. Not being an expert, I do not know if I am correct in drawing the deduction that reducing the number of working hours in order to control production and prices does not have the opposite effect to that which it is intended to have. In this, as in so many other branches of trade, the cholera epidemic caused a heavy loss, which, however, was recouped later on.

Last year (1892) 30,000 bales (each 400 lbs.) were used up in the factory at Schiffbek, and about 36,000 bales at Harburg. The production of the former in cloth was 9,810,000 yards (average weight, 10½ ozs. to the yard), which realised about 2½*d.* per yard. The number of hands employed was: Schiffbek, 1,150; Harburg, 1,600. The wages were: for spinners, 1*s.* 8*d.* to 2*s.* per day of 10 hours; for weavers, 1*s.* 9*d.* to 2*s.* 2½*d.* per day of 10 hours. This is about the average wages in these parts, but in some places in Germany wages are lower, and around Bremen they complain of the cost of labour compared to works in the interior.

The importation was:—

From—	1892.		1891.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
British India	873,350	663,855	1,357,862	987,823
Great Britain	180,996	148,166	170,900	128,796
France	10,130	6,656	15,178	10,380
Arabia	1,770	1,125	..	..
Bremen.. .. .	440	294	..	..

The exportation (which amounted to 72,405 cwts., of the value of 61,449*l.*) by sea went, with the exception of very small quantities to other countries, almost entirely to Bremen, Sweden,

and Great Britain. But a very much larger quantity (amounting to 623,358 cwts., value 473,679*l*.) found its way into the interior by way of the Elbe and by rail.

The course of business revealed some surprises. The ring of Saltpetre. producers in Chile thought they had limited the supply to the demand, and would consequently be in a position to enforce high prices. But this scheme was not destined to succeed, for the simple reason that in the spring there was a large decrease in the demand, which obliged them to sell at a much lower price. The mode of packing the saltpetre has occupied the attention of those interested in the trade. The buyers intimated to the Chilean Consul the desirability of a stronger material being made use of for packing, in order to minimise bursting in the sacks.

Under this head Florida phosphate deserves special mention. The price of this article has been reduced by half owing to over-production, thus rendering sales unprofitable.

The importation of saltpetre from Chile amounted to 6,169,175 cwts. (value 2,505,681*l*.), against 7,633,416 cwts. (value 3,052,660*l*.) in 1891.

The re-exportation amounted to 4,434,582 cwts., of which 3,729,107 cwts. went inland by rail and water. Of the remainder, 705,575 cwts., the principal customers were Great Britain, which took 100,088 cwts., Prussian Baltic ports, Russia, Sweden, Spain, and Denmark.

The importation exceeded that of the previous year. Owing Petroleum. to low freights in sailing vessels, coupled with the fact that tank vessels did not suffice to supply the demand, there was a considerable increased importation in casks. A large portion of the import was re-exported to the interior in tank barges. Out of the total importation about one-half was re-exported to the interior. The largest foreign customer was Denmark.

The Tank Steamship Company, whose three steamships accomplished 22 round voyages to the United States, in the course of the year paid a dividend of 11 marks per cent. compared with 12 marks per cent. in 1891.

The salt trade presented some peculiarities. The supply from Salt. the inland was far below that of 1891, both in regard to quantity and value, while the importation from Great Britain, almost the entire importation, was more than double that of last year in quantity and value.

On the other hand, the exportation seawards was little more than half, while by rail and river to the interior it was treble the quantity of that of the preceding year. The most noticeable changes were that the exportation to British India, which had attained to 1,518,962 cwts. in 1891, fell to 755,554 cwts. in 1892, while to West Africa, Australia, and Great Britain it increased by 12,378 cwts., 31,394 cwts., and 41,635 cwts. respectively.

The exportation to the last-named very nearly balanced the importation from the same. To nearly all other countries, both European and Transatlantic, the exportation showed considerable decrease, which cannot be accounted for in the increased supply to
(1812) B

inland customers, for the decrease to Sweden alone exceeded the excess over 1891 of the total volume sent inland.

Some 92 salt works are engaged in the production of this article in Germany, which is utilised in the manufacture of soda and glauber salts, chemicals and colours, soap and wax, glass, tanneries, ice and refrigerating purposes, tramways and other industries, agriculture, cattle, and manuring purposes. The total consumption in Germany may be estimated at from 7,000,000 cwts. to 8,000,000 cwts., which yield in taxation a sum of about 2,150,432*l*.

Butter

The butter trade as an article of export to foreign countries has assumed very large proportions, amounting to no less than 151,654 cwts., of the value of 799,774*l*. in 1892, which was considerably less than in the preceding year.

For the same cause so often referred to, the year 1892 cannot be regarded as a normal year, so that the decrease cannot be accepted as indicating any real diminution of trade.

Of the figures above mentioned the whole, with the insignificant exception of 23,638 cwts., which was all that found its way out of the total export to foreign countries, went to Great Britain. And to supply this export trade Hamburg derived more than the total quantity exported from inland sources. It is a great question as to how much of this article which is supplied to foreign markets is genuine butter. It is a well-known fact that the sale of genuine butter in the country is safeguarded from compounds known under the designation of butter. But this does not operate in the case of the exported article, and the large quantities imported into Hamburg undergo a great deal of manipulation in this city in the processes of washing and blending, so that it is a difficult matter, and one which only those expert in the trade can pronounce upon, to credit that what goes out is pure and unadulterated butter. But the opinion of outsiders seems to be unanimous in condemning it as an adulterated article.

Other articles.

In cement, grain, hardware, wine, beer, and musical instruments, Hamburg is now the emporium of a large import and export trade, the figures of which testify to the patient but persevering efforts Germany is making, and not unsuccessfully, to acquire a substantial share of the trade of the world.

The total value of the trade in the above-mentioned articles amounts to the value of 5,562,607*l*. for the importation, and 4,425,299*l*. for the exportation; and of those totals goods to the value of about 1,000,000*l*. come from Great Britain and British possessions, while goods to the value of 1,500,000*l*. are exported to the same. A further analysis of the statistics of trade in those articles demonstrates that with other and distant countries substantial progress is being made in foreign markets. This is most clearly noticeable in the case of such countries as Spain, Sweden and Norway, and Denmark in Europe, and the Transatlantic countries of the United States, Chile, Central America, China, and Japan. But the most important fact which this progress reveals is that this has been stimulated and is now being carried on by the

establishment of independent German lines, whether of steam or sailing ships.

Notwithstanding the unfavourable state of things which prevailed during the year, a net gain of 233,671*l.* was earned, but with the exception of 17,647*l.* which was put aside for loans, it was resolved to write off the whole of the net earnings so that the shareholders received no dividend.

By comparison with 1891, the net profit was less by 26,000*l.*, and the dividend nil, against 3 per cent. for that year. The cholera epidemic affected the company's vessels more severely than any others, because the passenger ships, the most important part of the service, were plying to countries where quarantine regulations were vexatiously and unreasonably stringent. There can be no question as to the speed, accommodation, and efficient management, and service of the magnificent boats of this company, which is extending its operations by establishing communications between various ports in Europe and the United States.

The fleet of steamships acquired by taking over the Hansa line is said to be doing good service, and the only line between Germany and Canada owes its existence to the enterprise of this company, which having regard to the unfavourable attitude of the United States towards emigration have cast their eyes towards Canada as the future field for this traffic. The sailings to Montreal have been increased to a bi-weekly service.

Fortune has so far favoured the company in the matter of accidents to their ships, so that they have, owing to immunity in this respect, been able to accumulate a large reserve insurance fund of considerably over 250,000*l.*

The total trade of both lines on the outward and homeward voyages came to 69,532 tons of the value of 4,628,921*l.*, against 71,242 tons of the value of 4,397,357*l.* for the year 1891. Of these figures, 28,997 tons of the value of 1,675,098*l.* were carried on the outward voyages, against 30,023 tons and 1,934,951*l.* in the year 1891. On the homeward voyages, 40,535 tons value 2,953,823*l.*, against 41,299 tons and 2,462,402*l.* in 1891.

Nearly the half of the outgoing goods, viz., 48 per cent. of the total value of the loadings in European ports and Port Said were loaded in Bremerhaven, 32.2 per cent. in Antwerp; 7.7 per cent. in Southampton; and 12 per cent. in Genoa. On the homeward journey, 18.9 per cent. of the total value were discharged in Genoa; 18.5 per cent. at Southampton; 24.7 per cent. in Antwerp; and 36 per cent. in Bremerhaven.

The chief articles of freight were as heretofore: on the outward journey, manufactures, woollen goods, colours, iron and steel wares (especially needles), cigars, and beer. On the homeward journey, wools, skins, furs and hides, raw silk, precious metals, other metals (zinc, lead, silver lead, copper), and tobacco, tea, coffee, and curios.

Of the goods carried on the outward and homeward routes, 65.1 per cent. of the total volume and 60.5 per cent. of the total value of the former were of German origin, while of the latter

44·3 per cent. and 29·6 per cent. respectively were shipped for the German markets.

East Asia line.

The East Asia line conveyed 38,102 tons of goods of the value of 3,095,735*l.*, on the outward and homeward voyages (against 38,249 tons and 2,817,108*l.* in 1891.) Of these figures, 73·3 per cent. of the total weight and 63·5 of the total value of the outward cargoes were of German origin, and 43·7 per cent. and 25·3 per cent. respectively of the homeward were for German markets.

The passenger traffic numbered 6,880 out and home in 1892, against 6,405 in 1891.

The Australian line.

The Australian line transported 31,430 tons of the value of 1,533,186*l.*, on their voyages in 1892 (against 32,993 tons and 1,580,245*l.* in 1891), giving a percentage of 54·6 per cent. of volume and 55·2 per cent. of value of goods of German origin on outward voyages, and 45·1 per cent. and 39 per cent. of volume and value of the goods carried on the homeward voyages was destined for Germany.

The passenger traffic in 1892 fell below the figures of 1891, being 4,999 for the former, against 5,877 in the latter year.

German East African line.

The German East African line accomplished 13 round voyages in 1892, in comparison with 12 out and 10 home in 1891. This increase was due to the commencement on March 1 of regular dates of departure. The route was from Hamburg viâ Amsterdam, in place of Rotterdam in the preceding year, and Delagoa Bay to Durban.

The total volume and value of the goods carried amounted to 23,657 tons and 834,166*l.*, compared with 21,740 tons and 632,419*l.* in 1891. The greater part of the outgoing goods, viz., 67·8 per cent. of the total value were loaded in Hamburg; 23·7 per cent. in Amsterdam; 5·6 per cent. in Lisbon; and 9 per cent. in Naples; and 1·6 per cent. of the homeward bound cargoes were landed in Naples; 0·4 per cent. in Lisbon; 27·7 per cent. in Rotterdam; and 73·3 per cent. in Hamburg.

The principal articles of freight outward comprised textiles and cotton goods, articles of consumption (especially beer and wine). Iron and steel wares, weapons and ammunition, building material and specie. And homeward, indiarubber, spices, nutmegs, sesame seed, ivory, wool, hemp, skins, and hides.

Of the outward cargoes transported by the steamships of this line, 63·1 per cent. of volume and 50·7 per cent. of value was of German origin, and 56·6 per cent. and 46·1 per cent. respectively of homeward cargoes were shipped for Germany. The passenger traffic increased considerably in comparison with 1891. The total number of all classes carried in 1892 being 2,082, against 1,443 in 1891.

German Levant line.

The German Levant line also suffered from the same unfavourable effects as other lines, and although a larger business was done than in 1891 the results were not so satisfactory in proportion. 23 round voyages were performed by the company's own steamships and five with chartered vessels. These latter brought a loss which reduced the net gain earned by the company's steamships

from 6,772*l.* to 4,922*l.* After writing off for depreciation, repairs, and other items there remained only a net profit of 1*l.* 10*s.* In order to obviate the necessity for chartering steamships in the future, three of the Hamburg South-American Company's steamships of 2,200 tons to 2,600 tons have been purchased. The capital of this company is quoted at 80,882*l.* in addition to a loan of 36,765*l.*, and the year 1892 was only its second year of working.

Notwithstanding the dislocation of the normal traffic by the cholera epidemic and the low freights prevailing on the West Coast of Africa route occasioned heavy losses, the company were enabled to declare a small dividend of 3 per cent. This was owing chiefly to the exceptionally low prices of coal and other material, and strict economy in the working expenses.

Woermann
line (African
Steamship
Company).

The net earnings of the steamships of the company, which completed 47 voyages, as against 49 in 1891, amounted to 29,740*l.*, so that allowing for depreciation and repairs the sum of 4,265*l.* was devoted to the distribution of the above dividend.

The company, realising that their fleet is too small to fulfil punctually their engagements, in accordance with their time-tables, in consequence of which they had been compelled frequently to charter steamers, resolved to contract with Messrs. Blohm and Voss, of Hamburg, for the building of a cargo steamer of 3,350 tons gross, which it is hoped will be ready for service in the autumn of 1893.

The Kosmos Steam Navigation Company declared as a result of the year's working a balance of income over expenditure of 32,185*l.*, which after allowing for writing off for various items the sum of 7,500*l.* for the payment of a dividend of 2½ per cent. against 8 per cent. for the previous year. This somewhat unfavourable result was due in the first place to the strong competition the company had to encounter, and the very low freights for outward bound.

Kosmos line.

The diminished shipments of saltpetre from the West Coast of America, and the hampering quarantine regulations which resulted in loss of time also operated most unfavourably. In consequence many steamers were either laid up or homeward bound in ballast. Notwithstanding this 33 round voyages were completed during the year. In order to maintain the efficient working of the line the company placed an order in England for the building of a steamship of 5,000 tons dead-weight capacity.

The deep sea fishing with steam vessels again makes a further advance. From Hamburg there are now 10 deep-sea fishing steamers in operation. The increase during 1892 to this class of industry amounted altogether to 21 fishing steamers, with an increase of tonnage of 7,896 cubic metres. Besides the above-mentioned 10 Hamburg steam fishing vessels there were altogether on January 1, 1893, 49 steamers engaged in this industry in the German North Sea Fisheries Fleet, of which 4 belong to Altona, 3 to Cranz, 38 to Bremerhaven-Geestemünde, 2 to Bremen, 1 to Emden, and 1 to Lübeck. On the other hand, the number of sailing craft has fallen from 408 to 396, and the tonnage of the same

Deep-sea
fishery.

class from 33,622 cubic metres to 32,744 cubic metres. The average tonnage of a single craft has increased from 82 cubic metres to 83 cubic metres.

Emigration.

The German emigrant to trans-Atlantic countries quits the Fatherland by one of three ports in Germany, and by one of three ports out of Germany. These are Hamburg, Bremen, Stettin, and Antwerp, Rotterdam, and Amsterdam. The number which emigrated in 1892 through the port of Hamburg was many thousands below that of the previous year, being 108,820 against 144,382. Of the total number 77,264 went to their destinations by direct route, and 31,556 by indirect, and of these figures 87 per cent. went to the United States and $4\frac{1}{2}$ per cent. to British North America, the remainder being distributed throughout Brazil, the Argentine Republic, Chile, Peru, Africa, Australia, and other countries. The various occupations to which the emigrants belonged were as follows: farming, 40.52 per cent.; industrial, 39.54 per cent.; commercial, 26.04 per cent.; labouring, 18.49 per cent.; other calling, 46.93 per cent.; without any occupation, 25.30 per cent. To convey these human freights 886 steam and 8 sailing ships were employed.

PORT OF BREMEN.

Shipping.

Annexes J
and K.

In the Vice-Consulates the year 1892 does not seem to have been a favourable one. Depression in prices was the prevailing feature. At Bremen, while the number of ships increased inwards and outwards, the tonnage decreased. Out of a total of 3,612 vessels which entered the ports of Bremen-Bremerhaven, with an aggregate tonnage of 1,996,378 tons in 1892, 389 ships and 514,310 tons were British. The trade between these ports and the United Kingdom was carried on by 577 vessels inwards, with 323,427 tons, and 786 vessels and 682,228 tons outwards. The tonnage so employed exceeded that of any other country. In the 5 years from 1888 to 1892 the number and tonnage of vessels engaged in the direct trade with the United Kingdom has increased by 160 vessels and 125,440 tons. The increase under this head of ships of British nationality has been 49 vessels, or about 30 per cent. in that period, and 165,205 tons. It is to be noticed that while the number of steamships increased and that of sailing ships decreased the proportion of tonnage was reversed, that of the former class decreasing while the latter increased by upwards of 36,000 tons.

Trade and Commerce.

Annexes L,
M, and N.

The depression in trade and commerce which characterised the year 1891 continued into the spring of 1892, but the revival which

then set in was checked by the proximity of the ports of Bremen-Bremerhaven to Hamburg, thus causing these to be regarded everywhere as completely infected by the epidemic which devastated the sister city. The total imports and exports in 1892 showed a marked decrease in volume and value. The total volume of the importation amounted in 1892 to 52,279,590 cwts., of the value of 35,269,337*l.*, and the exportation to 37,818,692 cwts. and 3,354,534*l.*, being in each case some thousands both in volume and value below that of 1891. Of the total value of the importation into Bremen in 1892 about 17,000,000*l.* represent the value of the goods from European, and 18,000,000*l.* from Transatlantic countries. The exportation, however, shows a different state of things, for while the value of the goods exported to European countries amounted to 25,000,000*l.*, that to Transatlantic ports did not exceed 8,000,000*l.*

In comparison with the year 1891 the value of the exportation to Great Britain showed a decrease of 158,006*l.*, whereas that of the importation increased by 426,707*l.*, which was realised almost entirely in raw materials. The following figures furnish the total values under three heads :—

Year.					Value of Imports from the United Kingdom.	Value of Exports to the United Kingdom.
					£	£
1891	..	..	..	..	2,155,130	1,597,756
1892	..	..	..	..	2,581,837	1,439,750

The principal articles of importation into Bremen-Bremerhaven are cotton, tobacco, wool, rice, petroleum, and grain. In some of these, notably wool, tobacco, and maize, a decided increase in the quantity imported took place compared with 1891, but transactions presented no striking features, and low prices and a want of animation were the chief characteristics throughout the year. Particulars of the quantity and description of the various staple articles imported and exported will be found in Table N.

There was a decrease during the year 1892 of 11,428 persons Emigration. in the number of emigrants. Indirect emigration viâ Leith and Glasgow from the City Docks of Bremen instead of from Bremerhaven was started for the first time by British steamships, and this route was chosen by 2,389 emigrants. The total number of persons who emigrated through Bremen-Bremerhaven in 1892 amounted to 127,029, of which one-third were Prussians, and all with the exception of 1,767 proceeded to the United States. Of the remainder 557 went to Brazil, 654 to the River Plate, 19 to Africa, 122 to Asia, and 415 to the Sandwich Islands. In the conveyance of these emigrants 229 steamships participated.

In common with all other kinds of business the operation of Industries. the industrial establishments offered nothing startling, and results (1812)

on the whole may be said to have been not very profitable, dividends either showing large decrease or no advance. Jute spinning paid no dividend against a high one in 1891. Wool combing, and cleaning and worsted spinning industries all showed an increase, but petroleum and breweries remained stationary.

Public works.

Much has been done of late to improve the navigation of the Weser, and the beneficial results of the work performed in 1892 is proved by the fact that 227 sea-going ships drawing from 15½ feet to 17¾ feet of water, ascended the river to the Bremen Docks. Two steamships of the North German Lloyd also navigated the river up to Bremen; one, a vessel of 311 feet in length, and 2,571 tons register, steamed up in ballast specially with a view to test whether a vessel of her length could navigate the many turns in the river and the experiment was successful. The other, a steamship of 2,334 tons, came up with the greater part of her cargo, and drawing 17 feet 5 inches entered the Bremen Docks.

The principal dock of Bremerhaven is being enlarged, this work being rendered necessary by the increasing size of the steamships of the North German Lloyd. When completed, vessels drawing 32 feet of water will be able to enter the dock. It is expected that as warships will be able to avail themselves of this dock the Empire will contribute to the cost of construction.

PORT OF LÜBECK.

General review of trade.

Here, as in other parts of Germany, inquiries revealed that no advance in trade and commerce as also in industry can be said to have taken place in 1892. The general condition of business throughout the year was decidedly unfavourable, and both the importation and exportation showed a decrease. The sea traffic with Russia, while meeting with no impediment, was, on the whole, sluggish, while that of Lübeck and the German Baltic ports increased in extent and activity. Much attention is being devoted to inland water communication, and in this respect the completion of the construction of the Elbe-Trave Canal is looked forward to as a certain means for counterbalancing, by the creation of new traffic, the decrease which the North Sea and Baltic Canal is expected to cause in the present trade of Lübeck. And having regard to the importance which is now attaching to inland navigation, the benefits to be derived from the Elbe-Trave Canal are confidently expected to be further developed in the future when the Rhine-Weser-Elbe Canal shall also have been completed. The extension of the Elbe system is watched with deep attention and interest, and though a considerable time may elapse before its realisation, there is little doubt but that in the ordinary course of time the Elbe and the Danube will become connected.

Shipping.

The number of vessels which arrived in Lübeck in 1892 was 2,416, with a tonnage of 687,200 tons, compared with 2,500 ships,

728,900 tons in 1891. The departures amounted to 2,418 ships and 696,900 tons, against 2,521 ships and 731,810 tons in 1891. The number and tonnage of British vessels in 1892 was the same as in 1891, being 30 vessels and 20,400 tons in each year. And 72 vessels of other nationalities representing a total of 59,950 tons entered the Port of Lübeck from British ports in the course of the year. The averages of the different rates were low. For timber from Memel to Lübeck 18s. to 21s. were paid per standard 100, and from St. Petersburg to Cronstadt, 19s. to 17. 2s. Swedish (South) iron, 5s. to 6s. per ton. Westphalian coke from Lübeck to Königsberg, 3s. 3½d. to 4s. per ton. Butter, 12s. to 14s., and later, 17s. per ton. Grain from Königsberg, 3s. to 5s. per ton.

The chief articles of importation from Great Britain are, iron ^{importation.} in many descriptions, coal, coke, and super-phosphate, amounting altogether to about 16,601,438 cwts., out of a total importation of 55,584,800 cwts. The import of coal from Great Britain in 1892 was about 5,000 tons below that of the preceding year, and that of coke was also less in proportion. A similar decrease was observable in German coal and coke. With regard to these articles the opinion is expressed that the formation of syndicates will not affect injuriously the importation of English coal, because the Westphalian article having only a short distance of water transport has the longer distance of high railroad freights to contend against. And apart from this the undoubtedly superior quality of British coal will always claim for it a preference.

The timber trade at Lübeck holds a prominent position. The importation in 1892 notwithstanding a decrease from Russian sources, which was a consequence of the higher rates of tariff, on the whole was nearly up to that of the year before. What was wanting in Russian supplies was almost made up for from Sweden, and by an increase in the imports from Austria-Hungary. Large areas of ground along the River Trave for the express purpose of storing timber have been provided by the State, and this facility will naturally give encouragement to the trade. The amount of importation was in 1892:—

Articles.					Quantity.
					Cubic yards.
Deals and planks	..	..	..	..	1,113,526
Beams and spars	..	..	..	..	100,833

The importation from Russia consists of spirits, oil, tar, hides, and grain. The importation of the last mentioned article has greatly decreased on account of the hitherto high duty in Germany. With the modification of these duties it would again attain its former importance.

Considerable quantities of fresh fish are imported from Denmark, Sweden, and Norway to supply the demands of the Lübeck smoke-drying manufactories. It will show how this industry

has developed when it is mentioned that the importation which amounted in 1885 to 30,624 cwts. had risen to 273,232 cwts. in 1890, and in 1892 had reached the total of 400,000 cwts.

PORT OF KIEL.

Shipping.

Vice-Consul Kruse, at Kiel, reports that 47 British vessels of an aggregate tonnage of 36,495 tons visited that port in 1892 in comparison with 75 vessels and 52,783 tons in 1891. The cause of this very large decrease is due to the scarcity of exports in Russia and the increasing competition of Baltic steamships. The importation here mentioned was about the same in each year, 245,000 tons. The transport of this volume of goods in 1891 gave employment to 93 vessels of a tonnage of 50,000 register tons against 42 vessels and 30,000 tons in 1892.

Freights were very low, ranging from about 4s. 4d. per ton to 5s. 6d. per ton, and only in very few instances 6s. per ton.

The same reports come from this quarter as from elsewhere of the languid condition of trade.

The grain trade, which formerly occupied an important position in the exportation of the port, is now confined only to home consumption, and whereas formerly the Russian, Prussian, and Pomeranian ports sent their supplies to Kiel, the United States and Danubian principalities have usurped their place.

Industries.

The principal industrial establishments at Kiel are ship-building works, especially the Germania, where many war-vessels are constructed. Flour mills, oil, moulding and manufacturing works. But all complained of unprofitable results. Though the ship-building establishments found pretty constant employment the contracts, owing to keen competition, gave scant margin for profit. In addition to the industries above mentioned, the breweries of Kiel must not be forgotten. Of these there are seven, which together produce annually above 2,400,000 gallons, and the profits of this industry depend naturally upon the prices throughout the year of barley and oats.

Importation.

The principal items of importation, in addition to coal, which is perhaps the most important, in 1892 were as follows:—

Description.						Quantity.
Timber	..	..	..	..	Cubic yards ..	49,889
Cattle	..	..	..	..	Number ..	22,727
Calves	..	..	..	..	" ..	5,193
Pigs..	..	..	..	..	" ..	100,398
Sheep	..	..	..	..	" ..	2,573

The cattle trade is increasing, and its great customers, besides the local consumption, are Hamburg and the western part of Germany.

General Remarks.

The conclusion to be drawn from the study of the statistics of trade and commerce of Germany as represented by its leading sea-port is that in the future Germany will not fail, and especially as new markets are developed, to extend her mercantile interests through her own enterprise, and one of the factors in this enterprise is that German emissaries go or are sent abroad liberally, who either for their principals or themselves establish a trade. In the latter case, when this has been accomplished they return to the Fatherland with the gain of their industry, from thence to prosecute their labours. It therefore behoves my countrymen to realise this, and to see that they do not from a false feeling of superiority fall behind in the competition, or the day of awakening may come too late. And the deduction to be drawn from the facts gathered together in this report is that they are not exactly of a congratulatory character, if it is considered that our commercial welfare is to a large extent dependent upon the maintenance by Great Britain of its position as the great carrying nation of the world.

It is a common complaint among British seamen that British vessels are now filled with foreign seamen. The fault is purely their own. The remedy lies only in their hands. It is a most difficult thing to ship British seamen here, because masters of ships prefer Germans and Scandinavians. They do not deny the superiority of their own, and that when in difficulty or danger they prefer to have a British crew at their backs, but the chief cause of preference for the Scandinavian and German is their superiority in the matter of sobriety and order. I readily and thankfully place on record that there is a great improvement among our seamen compared with 20 and 25 years ago. Better education and training ships have effected a good deal, but the British seaman has only himself to blame if foreigners take his place.

As far as my observation goes, not a tithe of the pains is devoted by my countrymen to the ascertaining the commercial needs and tastes of the rest of the world with which he trades which is given by the German. The latter endeavours to find out the wants and consult the tastes of his customers, while the former appears to think such details as outside his consideration, confident that his manufactures are superior to all. Good they may be, but the fastidiousness, convenience, and other details which may seem perhaps of little importance are studied by the German manufacturer and exporter.

Annex A.—COMPARATIVE Table of Shipping Entered at the Port of Hamburg in the Years 1891-92.

1891.

Country.	Number of Vessels.			Tons.			Number of Crews.		
	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.
North America ..	3	..	3	3,120	..	3,120	43	..	43
Argentina ..	2	..	2	1,881	..	1,881	26	12	38
Belgium ..	19	..	19	13,084	..	13,084	338	..	338
Brazil ..	1	..	1	775	..	775	24	..	24
Chile ..	..	..	..	..	..	..	..	..	..
Denmark ..	181	47	228	64,215	13,089	77,244	2,309	422	2,731
Germany ..	3,160	861	4,021	2,324,529	172,803	2,497,332	68,237	7,058	75,295
Bremen ..	408	258	666	177,941	51,491	209,432	2,929	2,162	5,091
Hamburg ..	2,090	270	2,360	2,023,468	100,876	2,123,343	61,224	3,895	64,619
Lubeck ..	..	1	1	..	718	718	..	16	16
Mecklenburg ..	13	2	15	7,037	998	8,035	156	22	178
Oldenburg ..	108	15	123	43,132	6,313	49,445	1,037	143	1,180
Prussia ..	541	315	856	72,951	32,903	105,854	2,891	1,329	4,211
France ..	105	5	110	72,771	2,187	74,958	2,165	67	2,232
Greece ..	1	..	1	999	..	999	19	..	19
Great Britain ..	2,980	244	3,224	2,416,329	216,118	2,632,447	60,110	4,037	64,147
Italy ..	33	5	37	20,410	2,485	22,895	420	59	479
Holland ..	1	..	1	293	..	293	11	..	11
Mexico ..	296	65	361	77,339	7,821	85,160	3,198	276	3,474
Norway ..	397	45	442	213,784	20,960	234,734	5,552	494	6,046
Austria ..	3	2	5	1,997	1,120	3,117	40	23	63
Portugal ..	..	..	..	..	..	..	..	..	..
Russia ..	28	..	28	26,028	1,059	27,087	504	24	528
Sweden ..	106	18	124	41,796	4,931	46,727	1,353	163	1,516
Spain ..	52	10	62	37,440	9,483	46,923	1,114	233	1,347
Turkey ..	..	..	..	..	..	..	..	..	..
Uruguay ..	1	..	1	372	..	372	10	..	10
Total ..	7,368	1,305	8,673	6,310,657	451,712	6,762,369	145,478	12,878	158,356

COMPARATIVE Table of Shipping Entered at the Port of Hamburg in the Years 1891-92—continued.

1892.

HAMBURG.

27

Country.	Number of Vessels.			Tons.			Number of Crews.			Proportionate Average for the Years 1889-92.	
	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	Number of Vessels.	Tons.
North America ..	2	..	2	2,301	..	2,301	33	..	33	0.02	0.05
Argentina ..	..	..	..	..	..	..	..	..	..	0.02	0.01
Belgium ..	16	..	17	15,763	511	16,274	343	17	360	0.21	0.21
Brazil ..	..	..	..	..	..	..	..	..	..	..	..
Chile ..	..	..	..	..	904	904	..	18	18	..	0.01
Denmark ..	160	74	234	63,807	22,797	86,604	2,126	773	2,899	2.53	1.33
Germany ..	3,022	998	4,020	2,176,427	205,273	2,381,700	59,309	8,918	68,227	48.81	43.05
Bremen ..	461	206	667	202,689	20,252	222,941	3,293	1,658	4,951	7.61	3.75
Hamburg ..	1,947	348	2,295	1,848,175	137,931	1,986,106	52,819	5,353	57,702	25.81	36.30
Lübeck ..	..	1	1	..	81	81	..	8	8	0.04	0.02
Mecklenburg ..	15	6	21	7,486	2,179	9,665	165	57	222	0.18	0.13
Oldenburg ..	85	14	99	36,753	3,999	40,052	880	79	959	1.41	0.83
Prussia ..	514	423	937	81,824	41,531	122,855	2,652	1,733	4,385	10.76	2.02
France ..	84	6	90	64,434	2,507	66,941	1,862	69	1,931	1.19	1.34
Greece ..	8	..	8	13,159	..	13,159	182	..	182	0.07	0.14
Great Britain ..	2,996	176	3,172	2,473,994	162,765	2,636,759	59,488	3,430	62,918	37.37	45.69
Italy ..	14	2	16	9,485	1,029	10,514	195	23	218	0.28	0.25
Mexico ..	..	..	..	..	..	..	..	..	..	0.02	0.01
Holland ..	319	64	383	88,782	7,319	91,101	3,365	275	3,640	4.84	1.69
Norway ..	380	48	428	193,771	24,442	228,213	5,365	640	6,005	5.00	3.98
Austria ..	3	..	3	2,357	..	2,357	38	..	38	0.05	0.04
Portugal ..	..	..	..	..	..	..	..	..	..	0.05	0.05
Russia ..	21	2	23	13,777	493	14,270	356	18	374	0.21	0.21
Sweden ..	99	21	120	47,110	6,313	53,423	1,368	244	1,612	1.52	0.93
Spain ..	51	1	52	37,577	1,613	39,490	1,128	59	1,167	0.80	1.01
Turkey ..	..	..	..	..	..	..	..	..	..	..	..
Uruguay ..	..	..	..	..	..	..	..	..	..	0.01	..
Total ..	7,175	1,394	8,569	5,203,044	435,966	5,639,010	135,158	14,464	145,622	100	100

Annex B.—COMPARATIVE Table of Shipping Cleared from the Port of Hamburg in the Years 1891-92
1891.

12

GERMANY.

Country.	Number of Vessels.			Tons.		Number of Crews.		
	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	In Ballast.	Total.
North America ..	..	2	2	..	2,374	2,374	32	32
Argentina ..	..	2	2	..	1,220	1,220	25	25
Belgium ..	13	6	19	10,846	3,480	14,326	98	353
Brazil ..	2	..	2	975	..	975	44	44
Chile ..	..	..	..	..	..	..	..	..
Denmark ..	261	33	284	69,760	9,802	79,562	306	2,689
Germany ..	2,995	1,114	4,019	2,061,897	502,186	2,564,083	13,340	75,345
Bremen ..	387	276	663	164,409	45,736	210,145	2,359	5,112
Hamburg ..	1,868	546	2,353	1,717,313	40,914	2,127,227	9,622	64,577
Lübeck ..	..	1	1	..	718	718	16	16
Mecklenburg ..	11	3	14	6,754	1,857	8,611	42	180
Oldenburg ..	74	48	122	38,473	9,745	48,218	254	1,150
Prussia ..	625	241	866	74,848	31,216	106,064	1,147	4,310
Ecuador ..	..	..	..	..	..	..	..	..
France ..	93	14	107	59,007	11,991	70,998	286	2,161
Greece ..	..	1	1	..	999	999	20	20
Great Britain ..	2,192	1,049	3,211	1,664,395	955,139	2,619,735	18,847	63,776
Italy ..	16	18	34	10,584	10,785	21,369	234	414
Mexico ..	1	..	1	293	261	554	9	20
Holland ..	320	89	359	79,869	3,831	83,700	141	3,465
Norway ..	340	125	465	176,503	68,134	244,637	1,643	6,415
Austria ..	4	3	7	1,924	1,766	3,690	42	91
Portugal ..	..	..	..	..	..	..	..	..
Roumania ..	23	8	31	16,900	5,056	21,956	120	568
Sweden ..	162	26	128	40,568	8,097	48,665	277	1,579
Spain ..	56	4	60	42,999	3,468	46,467	89	1,314
Turkey ..	..	..	..	..	..	..	..	..
Uruguay ..	..	1	1	..	372	372	10	10
Total ..	6,238	2,446	8,684	4,176,776	1,589,543	5,766,319	35,418	153,842

COMPARATIVE Table of Shipping Cleared from the Port of Hamburg in the Years 1891-92—continued.

1892.

Country.	Number of Vessels.			Tons.			Number of Crews.			Proportionate Average for the Years 1889-92.	
	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	Number of Vessels.	Tons.
North America ..	1	..	1	997	..	997	16	..	16	0.02	0.05
Argentina ..	..	..	..	..	..	..	..	..	..	0.01	0.01
Belgium ..	13	..	17	11,018	5,137	16,155	254	103	357	0.22	0.22
Brazil ..	..	..	..	..	..	..	..	..	..	0.01	..
Chile ..	..	..	..	..	..	..	..	..	..	0.01	0.01
Denmark ..	194	..	1	69,447	17,851	86,798	329	567	2,896	2.58	1.36
Germany ..	2,906	1,116	4,022	1,955,887	431,673	2,387,510	56,817	11,926	68,743	45.68	42.98
Bremen ..	344	318	662	153,191	55,681	208,872	2,603	2,102	4,705	7.59	3.66
Hamburg ..	1,818	497	2,315	1,698,684	317,828	2,016,507	50,443	8,217	68,660	25.76	36.39
Lübeck ..	..	..	..	..	..	..	..	..	..	0.03	0.02
Mecklenburg ..	11	5	16	3,612	3,326	6,788	99	69	168	0.18	0.13
Oldenburg ..	76	25	101	29,836	9,875	39,211	750	209	959	1.40	0.80
Prussia ..	657	271	928	70,514	45,468	115,982	2,922	1,329	4,251	10.72	1.98
Ecuador ..	..	..	..	..	..	..	..	..	..	..	..
France ..	76	15	91	54,326	13,631	67,957	1,626	382	1,958	1.21	1.35
Greece ..	..	8	8	..	13,159	13,159	..	182	182	0.06	0.14
Great Britain ..	2,027	1,138	3,165	1,518,121	1,115,712	2,633,833	41,883	20,375	62,858	37.27	45.53
Italy ..	6	11	17	8,671	7,388	11,059	76	154	280	0.26	0.24
Mexico ..	..	..	..	..	..	..	..	..	..	0.01	0.01
Holland ..	341	46	387	37,751	4,764	42,515	3,505	173	3,678	4.85	1.69
Norway ..	325	100	425	164,420	57,462	221,872	4,727	1,226	5,953	5.16	4.16
Austria ..	2	..	2	1,793	..	1,793	26	..	26	0.05	0.04
Portugal ..	..	..	..	..	..	..	..	..	..	0.05	0.05
Russia ..	6	6	12	2,095	4,093	6,188	65	99	164	0.19	0.19
Sweden ..	95	32	127	40,738	16,495	57,233	1,315	396	1,711	1.55	0.96
Spain ..	43	13	56	30,863	11,327	42,190	961	293	1,254	0.80	0.01
Turkey ..	..	..	..	..	..	..	..	..	..	..	..
Uruguay ..	..	..	..	..	..	..	..	..	..	0.01	..
Total ..	6,036	2,529	8,565	3,941,981	1,698,182	5,640,163	113,618	35,423	150,041	100	100

Annex C.—COMPARATIVE Table of Imports and Exports during the Years 1890-92.

IMPORTS.

Articles.	1890.		1891.		1892.	
	Quantity	Value.	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£	Cwts.	£
Articles of consumption ...	24,566,674	22,997,783	25,331,372	26,456,078	33,586,436	27,676,640
Building material and fuel ...	35,130,600	1,584,328	40,583,576	1,816,000	35,677,952	1,940,361
Raw material and half-manufactured goods ...	37,975,224	36,372,143	40,068,680	39,687,240	48,199,334	37,889,496
Textiles ...	397,000	2,594,606	400,100	2,710,918	430,902	2,797,018
Industry and art ...	2,069,174	3,987,646	2,022,600	3,997,888	1,972,178	3,644,608
Total ...	100,139,532	67,496,506	108,503,778	74,578,344	160,815,482	72,958,523

EXPORTS.

Articles.	1890.		1891.		1892.	
	Quantity	Value.	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£	Cwts.	£
Articles of consumption ...	27,180,284	24,812,880	28,177,680	26,087,987	24,328,828	20,541,453
Building material and fuel ...	3,524,984	394,197	3,608,688	374,441	3,710,880	360,803
Raw material and half-manufactured goods ...	12,975,536	12,894,965	15,181,482	13,751,785	13,482,500	13,607,260
Textiles ...	813,468	9,520,582	835,974	9,047,837	964,002	9,180,373
Industry and art ...	6,752,418	14,165,460	5,908,592	14,239,166	5,942,602	13,563,460
Total ...	50,246,690	61,788,014	53,661,216	63,601,216	48,419,292	56,746,892

Annex D.—TABLE of Importation in the Years 1891–92, excluding Great Britain.

Country.	1891.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
German ports	2,369,610	1,502,681	2,094,740	1,416,237
Northern Europe	4,071,438	1,904,118	3,647,598	1,607,992
Holland and Belgium..	2,213,858	2,594,960	1,831,394	2,006,862
France	2,268,714	2,602,780	2,296,502	2,533,622
Spain and Portugal ..	2,499,392	1,354,908	2,525,982	1,532,704
Italy and Southern				
Europe	10,327,042	4,506,584	9,747,562	3,613,150
North America.. ..	10,823,158	8,709,290	18,750,940	11,046,866
West Indies	1,033,240	2,014,882	916,898	2,031,082
Mexico and Central				
America	1,190,070	2,991,167	1,084,978	2,529,008
South America, East				
Coast	4,369,270	10,263,810	5,194,616	10,468,207
South America, West				
Coast	8,752,193	5,352,257	7,413,520	4,634,420
Africa, East Coast and				
Cape	252,130	781,624	227,010	706,893
Africa, North and West				
Coast	1,943,132	1,524,511	2,154,708	1,655,408
East Indies	6,870,640	6,317,560	7,610,158	5,995,181
China and Japan	904,928	1,320,348	659,206	1,124,650
Asia (remainder)	421,830	399,358	757,158	563,524
Australia	387,258	1,041,351	405,190	1,141,230
South Sea Islands	285,860	121,717	120,646	79,060
Total	60,983,768	55,303,906	67,438,806	54,685,598

Annex E.—TABLE of Exportation in the Years 1891-92, excluding Great Britain.

Country.	1891.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
German ports	3,600,098	4,109,765	3,632,270	3,794,035
Northern Europe	4,357,380	5,896,283	5,080,678	5,254,002
Holland and Belgium..	850,283	1,737,205	1,602,912	1,543,928
France	975,124	973,482	768,448	774,453
Spain and Portugal ..	1,437,392	2,356,537	845,984	1,350,050
Italy and Southern				
Europe	1,022,756	1,347,734	1,672,948	1,757,290
North America.. ..	11,991,792	10,485,865	7,980,916	7,910,422
West Indies	704,668	814,860	756,394	858,978
Mexico and Central				
America	686,436	1,723,936	651,430	1,397,467
Venezuela and Colum-				
bia	790,638	1,387,573	565,124	830,267
South America, East				
Coast.. ..	2,419,568	4,770,377	3,119,130	5,469,079
South America, West				
Coast.. ..	1,187,238	1,892,033	1,417,222	2,897,710
Africa, East Coast and				
Cape	442,494	680,947	461,086	754,981
Africa, North and West				
Coast.. ..	1,133,326	1,238,580	1,033,094	1,017,576
East Indies	2,395,270	1,583,710	465,256	1,840,377
China and Japan	886,650	1,500,768	916,634	1,643,740
Asia (remainder)	200,678	416,156	231,892	467,823
Australia	1,668,896	1,360,273	919,242	812,185
South Sea Islands	185,692	157,428	67,872	112,496
Total	36,826,379	44,442,512	32,187,522	39,986,859

Annex F.—TABLE of Importation from Great Britain into
Hamburg in the Year 1892.

Articles.		Quantity.	Value.
			£
Coal	Tons	1,627,970	1,181,960
Coffee	"	3,229	294,151
Indiarubber	"	1,409	244,100
Iron ore.. .. .	"	79,430	203,050
Copper	"	7,030	366,153
Furs, skins, &c... ..	"	472	255,353
Leather	"	1,732	293,738
Sulphate ammonia	"	28,505	310,585
Wool, raw material	"	28,252	2,542,000
Shoddy wool	"	4,558	318,677
Cotton	"	6,453	476,097
Cotton yarn	"	9,217	1,328,181
Wool and yarn	"	10,612	2,018,264
Woollen manufactures.. ..	"	1,576	640,526
Cotton	"	4,862	859,334
Machinery	"	17,263	726,006
Other articles	"	286,263	6,041,550
Herrings	Barrels	152,559	213,705
Total .. .. .	.. ..	2,118,838	18,313,430
„ 1891 .. .. .	.. ..	2,376,000	19,274,454

Annex G.—TABLE of Exportation to Great Britain from
Hamburg in the Year 1892.

Articles.		Quantity.	Value.
			£
Horses	Number	10,928	134,510
Raw sugar	Tons	212,709	3,119,876
Crystallised sugar	"	111,797	1,919,340
Refined sugar	"	121,517	2,147,428
Butter	"	6,400	680,961
Eggs	"	18,778	749,714
Leather	"	1,022	382,000
Cotton yarn	"	3,253	454,519
Woollen goods	"	1,167	471,690
Hosiery	"	1,512	434,500
Furniture	"	6,075	228,274
Paper	"	21,398	476,663
Glassware	"	12,235	306,984
Pianos	"	3,120	339,228
Other musical instruments	"	790	105,212
Toys	"	2,746	177,905
Palm oil.. .. .	"	7,940	168,647
Other articles	"	248,926	5,942,394
Total .. .. .	.. ..	781,385	18,239,845
„ 1891 .. .. .	.. ..	799,227	19,039,136

Annex II.—COMPARATIVE Table of Jute Imports during the Years 1883-92.

Years.	Great Britain.				Export from Great Britain.	Continent.		Total Europe.	
	Dundee.	London.	Other Ports.	Total.		Hamburg.	Other Ports.		
Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.		
1883	205,809	187,631	26,463	869,903	88,884	14,950	94,181	113,131	394,159
1884	199,777	137,672	8,120	255,569	83,144	18,678	82,348	101,026	273,451
1885	172,223	107,572	6,572	286,367	98,480	31,550	91,184	122,734	310,621
1886	147,622	90,300	29,712	267,724	94,164	30,274	94,398	124,572	298,232
1887	189,456	125,831	13,289	328,626	100,596	48,401	95,115	143,516	365,778
1888	187,267	117,497	9,703	314,467	102,784	46,669	113,947	163,616	375,296
1889	215,132	140,000	8,748	373,489	115,629	56,576	120,315	176,888	434,739
1890	226,820	135,995	8,133	369,958	109,735	71,519	127,853	202,572	462,795
1891	220,288	115,523	9,069	344,820	116,002	77,547	159,783	237,339	472,148
1892	168,314	80,585	6,711	255,610	87,031	53,388	118,716	172,104	340,633

GERMANY.

Annex I.—TABLE of Importation of Live Stock into Hamburg during the Year 1892.

	Oxen and Cows.	Calves.	Sheep and Lambs.	Pigs.	Total.	Horses.	Total Value.
By rail and river ...	136,223	67,306	107,017	365,419	675,965	28,773	£ 4,651,960
By sea	6,006	91	412	1,612	8,121	613	135,270
Total	142,229	67,397	107,429	367,031	684,086	29,291	...
„ value £	1,993,971	247,794	194,068	1,146,520	3,582,353	1,204,877	4,787,230

AVERAGE Price of Meat in the Hamburg-Altona Central Market in Shillings per Cwt. during the Years 1891-92.

	1891.			1892.		
	Best Quality.	Good.	Inferior.	Best Quality.	Good.	Inferior.
Oxen	62·60	58·02	53·20	65·36	59·89	48·83
Calves	...	65·10	...	...	75·64	...
Pigs	49·51	47·99	41·45	55·29	54·52	52·54

Annex J.—RETURN of Shipping at the Port of Bremen during the Year 1892.

From and to—	Entered.		Cleared.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Great Britain and Ireland	577	323,427	786	632,228
Germany	1,339	210,647	1,643	256,994
Other parts of Europe..	1,101	233,431	1,046	197,008
North America.. ..	356	834,514	251	663,104
Central and South America	86	137,014	69	114,625
West Indies	26	9,717	6	2,904
Africa	2	3,229	1	349
Asia	112	209,341	17	44,576
Australia and Sandwich Islands	13	35,058	17	36,810
Total	3,612	1,996,378	3,836	1,998,598

Annex K.—TABLE of Shipping between the Port of Bremen and Ports in the United Kingdom during the Year 1892.

Nationality.	Arrivals from the United Kingdom.			Departures for the United Kingdom.			
	With Cargo.		In Ballast.	With Cargo.		In Ballast.	
	Number of Vessels.	Tons.		Number of Vessels.	Tons.		
British ..	147	106,484	7	85	83,693	237	357,913
Bremen ..	209	156,840	7	168	138,454	60	67,458
German ..	195	25,652	1	38	4,927	162	29,198
Russian ..	1	649	..	..	..	..	..
Swedish..	1	845	..	..	..	5	1,814
Norwegian	..	..	..	..	..	10	11,777
Danish ..	2	1,404	..	2	186	11	1,653
Dutch ..	5	765	..	1	70	1	95
Belgian..	1	402	..	..	..	1	402
French ..	..	..	..	1	106	..	..
Greek ..	..	..	..	..	..	4	5,331
Total ..	562	293,041	15	295	206,536	491	475,692

Annex L.—IMPORTATION from Great Britain into Bremen during the Year 1892.

Articles.				Value.
				£
Cotton, raw, yarn and twist ..	..	..	..	125,405
Wool ..	..	..	..	1,434,884
Other kinds of yarn ..	..	..	..	69,908
Jute ..	..	..	..	53,442
Steel ..	..	..	..	18,667
Iron and steel goods ..	..	..	..	41,142
Machines ..	..	..	..	46,951
Coffee ..	..	..	..	39,666
Tea ..	..	..	..	34,418
Tobacco ..	..	..	..	4,394
Coals ..	..	..	..	129,705
Indigo ..	..	..	..	23,929
Drugs and chemicals ..	..	..	..	33,084
Indiarubber ..	..	..	..	50,582
Slate ..	..	..	..	9,579
Leather ..	..	..	..	171,633
Miscellaneous ..	..	..	..	290,423
Total ..	..	..	..	2,582,817

SUMMARY.

Articles.				Value.	
				1892.	1891.
				£	£
Articles of food ..	..	..	..	143,893	142,596
Raw materials ..	..	..	..	1,706,251	1,304,541
Part manufactured goods ..	..	..	..	573,616	512,149
Manufactures ..	..	..	..	33,419	40,920
Other productions of industry ..	..	..	..	124,660	154,923
Total ..	..	..	..	2,581,839	2,155,129

Annex M.—EXPORTATION from Bremen to Great Britain during the Year 1892.

Articles.						Value.
						£
Wood	..	..	..	..	..	91,000
Sheddy wool	..	..	..	..	..	7,000
Lead	..	..	..	..	..	32,000
Hops	..	..	..	..	..	16,000
Beer	..	..	..	..	..	27,000
Coffee	..	..	..	..	..	21,000
Sugar	..	..	..	..	..	500,000
Rice	..	..	..	..	..	20,000
Tobacco	..	..	..	..	..	22,000
Cloves	..	..	..	..	..	7,000
Drugs and chemicals	..	..	..	..	..	17,000
Dry colours	..	..	..	..	..	31,000
Starch	..	..	..	..	..	30,000
Skins and furs	..	..	..	..	..	32,000
Glassware	..	..	..	..	..	80,000
Teas	..	..	..	..	..	77,000
China	..	..	..	..	..	48,000
Musical instruments	..	..	..	..	..	11,000
Fancy goods	..	..	..	..	..	16,000
Iron, cutlery wares	..	..	..	..	..	40,000
Miscellaneous	..	..	..	..	..	241,000
Total	..	..	..	..	..	1,078,000

SUMMARY.

Articles.	Value.	
	1892.	1891.
	£	£
Articles of food	691,000	771,000
Raw materials	2,080,714	882,101
Part-manufactured goods	36,841	18,004
Manufactures	24,198	36,006
Other productions of industry	36,226	387,025
Total	3,796,964	1,627,737

Annex N.—TABLE of Principal Articles Exported from and Imported at Bremen during the Year 1892.

Articles.		Quantity.	
		Imports.	Exports.
Cotton	Cwts.	3,492,237	3,452,251
Wool	"	1,324,297	1,312,151
Jute	"	228,361	122,404
Hides	"	8,750	91,275
Cement	"	136,806	1,052,974
Bricks	Pieces	26,874,601	57,976
Manure	"	202,507	158,207
Petroleum	"	2,072,631	1,900,325
Tobacco	"	918,713	952,778
Cigars	Thousands	118,325	1,790
Rice	Cwts.	5,601,215	4,392,872
Coffee	"	227,941	184,987
Flour	"	397,522	507,115
Sugar	"		
" raw	"	575,020	574,570
" refined	"	816,669	351,151
Grain	"	5,707,430	4,628,813
Spirits	Gallons	255,946	1,126,070
Beer	"	416,013	1,830,400

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AND FINANCE.

G R E E C E.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE CONSULAR DISTRICT OF PATRAS.

*Presented to both Houses of Parliament by Command of Her Majesty,
MARCH, 1894.*

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1220. Antwerp	1d.	1280. Pekin	2½d.
1221. Mogador	2½d.	1281. Salvador	1d.
1222. Berlin	1½d.	1282. Malaga	4d.
1223. Rome	1d.	1283. Buenos Ayres	8½d.
1224. Constantinople	6½d.	1284. Canton	1d.
1225. Barcelona	2½d.	1285. Washington	4½d.
1226. Madeira	5½d.	1286. Warsaw	1d.
1227. Seoul	1½d.	1287. Pekin	1½d.
1228. Chinkiang	1d.	1288. Amsterdam	1d.
1229. Newchwang	1d.	1289. Manila	2½d.
1230. Chungking	1½d.	1290. Bahia	1d.
1231. Hankow	1d.	1291. Munich	1d.
1232. Odessa	2d.	1292. Trieste	1½d.
1233. Chicago	3d.	1293. Tunis	4d.
1234. Tagaurog	2½d.	1294. Montevideo	1½d.
1235. Ningpo	1d.	1295. Belgrade	2d.
1236. Mannheim	1d.	1296. Teneriffe	1d.
1237. Dunkirk	1d.	1297. Stettin	3d.
1238. Macao and Timor	1d.	1298. Rome	2½d.
1239. Madrid	1½d.	1299. Dantzic	7d.
1240. Port au-Prince	2d.	1300. Sofia	2½d.
1241. Frankfort	3d.	1301. Mexico	1½d.
1242. Erzeroum	1d.	1302. Paris	1d.
1243. Palermo	3½d.	1303. Buenos Ayres	1½d.
1244. Naples	1d.	1304. Tangier	2½d.
1245. Guatemala	1d.	1305. Somali Coast	1½d.
1246. Madrid	1d.	1306. Porto Rico	1d.
1247. Gothenburg	2d.	1307. Paramaribo	1d.
1248. Brindisi	2½d.	1308. Oporto	1½d.
1249. Fiume	2d.	1309. Naples	1½d.
1250. Leghorn	2½d.	1310. Salonica	2½d.
1251. San Francisco	6½d.	1311. Valparaiso	2d.
1252. Bushire	2d.	1312. Mozambique	1d.
1253. Nagasaki	1d.	1313. Odessa	1½d.
1254. Smyrna	1d.	1314. Honduras	2½d.
1255. Yokohama	1½d.	1315. Batoom	4d.
1256. Stockholm	1½d.	1316. Quilimane	1d.
1257. Lisbon	1½d.	1317. Copenhagen	1d.
1258. Tientsin	1d.	1318. Lima	1d.
1259. Port Said	1d.	1319. New York	1d.
1260. Hiogo and Osaka	2½d.	1320. Baghdad and Bussorah	1d.
1261. Damascus	1d.	1321. Rio de Janeiro	3d.
1262. Samoa	1½d.	1322. Réunion	3½d.
1263. Rio Grande de Sul	2½d.	1323. Berne	1d.
1264. Jeddah	1d.	1324. Kiukiang	1½d.
1265. Vienna	2d.	1325. Reasht	8½d.
1266. Shanghai	3d.	1326. Florence	1d.
1267. Bangkok	1½d.	1327. Hakodate	1d.
1268. Meshed	1½d.	1328. Paris	2d.
1269. Cadiz	2d.	1329. Paramaribo	1½d.
1270. Cherbourg	1d.	1330. St. Petersburg	2½d.

No. 1331.

GREECE.

PATRAS.

Acting-Consul Wood to the Earl of Rosebery.

My Lord, *Patras, February 24, 1894.*
ENCLOSED I have the honour to transmit to your Lordship my Report on the Trade and Commerce of the Morea for the year 1893.

I have, &c.
(Signed) F. B. WOOD.

Report on the Trade and Commerce of the Morea for the Year 1893.

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Shipping and Navigation.

The British vessels which have entered the port during the past 5 years are as follows:—

British
shipping
entered.

Year.	Number of Vessels.	Tons.	Crews.
1889	110	107,691	3,039
1890	108	103,085	2,574
1891	180	123,343	3,074
1892	121	121,612	2,863
1893	128	133,084	3,046

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of which 117 were steamers and 11 were sailing vessels of a tonnage of 1,174 tons; of these latter, 6 loaded valonea for the United Kingdom.

Freights
ruling.

The average rate of freight for currants during the year have ruled as follows:—

Port.		Per Steamer.	
		From—	To—
		£ s. d.	£ s. d.
London	Per gross ton ..	0 15 0	1 0 0
Liverpool	" " ..	1 0 0	1 2 6
Bristol	" " ..	1 2 6	1 7 6
Hull	" " ..	1 0 0	1 2 6
Antwerp	" " ..	0 17 6	1 0 0
Holland	" " ..	0 15 0	0 17 6
Hamburg	" " ..	0 17 6	1 2 6
		Francs.	Francs.
Rouen	Ton of 1,000 kilos.	20	25
Bordeaux	" " ..	22	26
Marseilles	" " ..	10	15
		£ s. d.	£ s. d.
New York	Per gross ton ..	0 17 6	1 5 0
Montreal	" " ..	1 12 6	1 15 0
Australia	Per cubic ton ..	2 2 6	2 5 0

Freights for valonea have ruled from 26*s.* per ton to 30*s.* per ton, but only two sailing vessels have been chartered to load produce of this year's crop for the United Kingdom.

Foreign
steamers
competing
with British
flag.

The number of foreign steamers which have competed with the British flag during the past year is as follows:—

Nationality.	Number of Vessels.	Tons.
German	16	15,103
Austrian	7	7,489
Dutch	3	2,409
Italian	2	1,639
Norwegian	2	1,449
French	2	1,412
Russian	2	1,359
Danish	1	846

Of these, two German steamers landed 2,500 tons of coal and one French 650 tons of coal; the remainder came mostly in ballast, or with part cargo for foreign ports, and loaded currants principally for the continent.

Regular lines
of steamers to
Patras.

In the above return of foreign steamers calling at this port, the regular postal steamers of the Austrian Lloyd and of Florio Rubatino Italian Lines are not included, as these do but little carrying trade, being limited mostly to the passenger and postal

service. Steamers of the Austrian Lloyd keep the following service with this port:—

Leave Trieste every Saturday at 11 A.M., and, after touching Trieste-Constantinople regular line of Austrian Lloyd steamers. at Corfu, arrive at Patras on Tuesday at 4 A.M., leaving at 6.30 A.M. for Constantinople via the Piræus and other ports. The up steamer of same line arrives at Patras from Constantinople and the Piræus every Thursday at 5 P.M., and leaves the same day at 9 P.M. for Trieste via Corfu.

Leave Trieste every fortnight on Wednesdays at 4 P.M. via Trieste-Thessaly regular line of Austrian Lloyd steamers. Fiume and Corfu, and arrive at Patras at 3 A.M., leaving the same day at 7.30 A.M. for the various ports of the Morea, Piræus, Volo, Salonica and Constantinople. The up steamer of the same line, after touching at the above-named ports, arrives on Thursday at 3.30 P.M., and leaves the same day for Trieste via Corfu and Fiume.

Leave Trieste every fortnight on Tuesday and arrive at Trieste-Greek-Levant line of Austrian Lloyd steamers. Patras on Saturday at 1.30 P.M., and leave same day for the Piræus, Crete, Smyrna and Cyprus. The up steamers of this line arrive here every alternate Saturday at 4.30 P.M. and leave same day for Trieste via Corfu at 1 A.M.

Instead of bringing passengers and mails from Brindisi twice a week as heretofore, the mail now only comes once a week, leaving Brindisi on Sunday evening and arriving here on Tuesdays at 5 A.M. Letters from London are brought by this mail communication in four days. These steamers leave again on Tuesday evening for Brindisi via Corfu. Brindisi-Patras line of Italian steamers.

In consequence of the prevalence of cholera, a quarantine of Quarantines. from 5 to 10 days was imposed during the autumn and winter months on arrivals from the southern ports of France, almost all Italian ports, Trieste, Fiume, Tunis, the coast of Syria, &c., and this proved a great hindrance and cause of expense to many British steamers chartered to load currants in Greece during those months. The Leyland and Cunard Lines which keep up a regular service for merchandise between this port and Liverpool, touching on the way at various Italian and other ports, were seriously hampered in their operations by the quarantines imposed.

Quarantine stations were created on the Island of Saint George, Quarantine stations. near Corfu, on the Island of Trizonia in the Gulf of Corinth, on the island called Delos by the Greek Government, but marked in the Admiralty Charts as Rhenea, close to the small Island of Delos, and finally at Trikeri (Island) near Volo. Masters of steamers complained pretty generally of the bad quality of the provisions supplied at these stations and of the very high prices charged for them.

The law prohibiting the shipment of currants of the new crop Shipments of currants. before August 16 (28) is still in force.

All steamers entering the Inner Patras Harbour are required to have an authorised pilot on board, the charge for same being 1*l*. Pilotage.

During the past year a new scale of dues has come in force, as follows:—

All steamers having no special convention with the Greek Harbour and light dues. (1695) A 3

Government are charged at the first Greek port they enter, 50 c. (gold) per ton, register tonnage, if they discharge or load cargo at that port, if they both discharge and load cargo the charge is 1 fr. (gold) per register ton; besides there is in either of the above cases a charge of 2 l. (centimes, paper) per register ton for health dues. After paying above dues at her first port of entry, a vessel may call at any number of Greek ports without incurring any further dues beyond 1 l. (centime, paper) per register ton at each port for health dues.

Steamers having special conventions with the Greek Government pay 35 l. (gold) instead of 50 l. paid by others, and 70 l. against 1 fr.

Cost of
stowage.

According to the custom of this port the stowage of goods shipped for export is done by stevedores supplied by the shippers, the cost of such stowage being borne by the ship. The charge on currants, which is the principal article exported, is:—

Description.	Quantity.	Charge.
	Cwts.	d.
Per barrel, containing about	3	1
Case " " " "	1½	1
Half case " " " "	¾	½
Quarter case " " " "	¾	½

besides 6 dol. per 100 mills net of currants, say about 1l. 6s. per 45 tons 4 cwts. of currants shipped. Altogether the cost to the ship of stowing currants amounts from 1s. 3d. per ton to 1s. 9d. per ton, according to the packages shipped, the cost of stowing the smaller cases being proportionately much greater than that of barrels.

Warning to
shipowners
against
chartering to
irresponsible
persons.

Owners of vessels should be careful to obtain reliable information as to the character, standing and position of persons applying to them with the view to chartering their vessels.

Several cases have occurred during the last 2 years in this district, by which owners of vessels have suffered very considerable pecuniary loss and detention by chartering their vessels to irresponsible persons. These gentry get the vessels loaded fast enough when the freights ruling happen to be in their favour, and are thus able in a favourable season to establish a reputation as trustworthy brokers, but so soon as the freights go against them they entirely fail to carry out their agreement as per charter, and simply leave the vessel in the lurch without compensating the owner in any way for his loss. Recourse to law is tedious and expensive, and in any case there is not much practical use in getting a verdict against a man who has no means whatever.

There are many respectable and trustworthy ship brokers and other commercial firms engaged in the shipping trade in this district; any ship owners wishing to obtain their names, and any

other information on the subject, need only apply to this Consulate and it will be supplied to them.

During the past year the roadstead of Kyllene (Admiralty Chart, Clarenza) on the north-western coast of the Morea, nearly opposite Zante, has been converted into a good harbour for smaller sized vessels by the addition of an arm running from north to south to the existing quay, and vessels are now protected against the northerly and north-easterly winds so prevalent in these parts during the winter months. The work has been accomplished at a cost of about 20,000*l.*, and will be most useful to vessels loading currants to Kyllene, and will also serve as a harbour of refuge during bad weather to craft bound for this port and the Gulf of Corinth in general.

The Corinth Canal, as it is called, was officially thrown open to general traffic in November last.

It is open to vessels of all nationalities, provided they do not draw more than 7 metres and 20 decimetres of water and do not measure more than 20 metres in breadth.

Sailing vessels of a burthen of over 20 tons are compelled to use tug-boats supplied by the Canal Company.

Vessels may pass through the Canal at all hours of the day and night.

The following are the tolls charged for passing through the Canal:—

Mail and passenger steamers either going to or coming from the Adriatic Sea pay 75 gold c. per register ton and 1 gold fr. for every passenger carried. Mail and passenger steamers to and from any other destination but the Adriatic pay 50 gold c. per register ton and 1 fr. for each passenger; all other vessels pay 40 gold c. per ton.

Dimensions.					Metres.
Depth of the Canal	..	..	..	..	8
Breadth at bottom of the Canal	..	..	..	..	21
Breadth at surface	..	..	..	..	24.60
Entire length	..	..	..	..	6,800

Since the Canal was opened in November last only about 200 vessels have passed through, and these consisted almost entirely of small Greek sailing craft. A few ships of war and some yachts have also availed themselves of the Canal. None of the large steamship companies have as yet decided upon sending their vessels through the Canal, although it is confidently expected that the Austrian Lloyd, the Messageries Maritimes, and other lines connected with the Levant trade will ultimately decide upon using it.

It is reported that the usual strength of the current in the Canal is about 1 knot, and occasionally attains a strength of 2 to 3 knots, when great care in the navigation is required to keep the vessel from bumping against the steep sides of the Canal.

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Lighting of
approaches to
Canal.

Some additional lights have been placed in the Gulf of Corinth, but it is reported that steamship companies require still better lighting before deciding finally to adopt the Canal route. No shipwreck has occurred in this district during the past year.

Exports.

Decrease in
value of
exports.

Compared with the reports on the trade and commerce of this district for the years 1891 and 1892, the return of exports by British shipping for 1893 shows a decrease of 522,058*l.* and 433,388*l.* respectively. This is in no way due to a decrease in the quantity of merchandise exported, but entirely, as will be seen by referring to Table giving comparative prices of currants, to the enormous decline in the price of this commodity, which is the principal article of export from this district.

Peronosporos
amongst
currant and
grape
vineyards.

In the month of June this malady of the currant and grape vineyards, which had done such serious damage in the preceding year, again appeared in almost all the currant and grape growing districts of the Morea, notwithstanding all the precautions taken by growers of sprinkling the plants with a weak solution of sulphate of copper diluted in water. Luckily, although the leaves were all covered with the white spots caused by the malady, the fruit did not suffer as in the previous season, owing, no doubt, to a much drier state of the atmosphere this season, and to the more advanced stage of development which the fruit had reached when the malady appeared. By the end of July all fears of damage by peronosporos were allayed, and favoured by fine weather during the drying process one of the largest and finest currant crops on record was secured.

Size of currant
crop.

The quantity produced in the Morea and Ionian Islands was variously estimated at from 165,000 to 175,000 tons of dried currants. Under these circumstances it would naturally be supposed that all the currant districts would be exceedingly prosperous, but, unfortunately, just the reverse has occurred, and for the following reasons:—

Up till 1877 the dried seedless currant was exported to the United Kingdom, United States, Continent of Europe, &c., solely for eating purposes, and as the consumption only increased very gradually, the production just about kept pace with the increased demand. Thus during the following 6 years the production of currants was:—

Year.						Quantity.
						Tons.
1872	..	..	..	..	..	70,766
1873	..	..	..	..	..	71,222
1874	..	..	..	..	..	76,210
1875	..	..	..	..	..	72,916
1876	..	..	..	..	..	86,947
1877	..	..	..	..	..	82,181

the consumption of the world being at this time between 75,000 tons to 85,000 tons.

In 1877, however, France began seriously to feel the effects of the phylloxera which had destroyed many vineyards in the south and was gradually extending all over the country.

French wine producers in order to meet the constant demand for French wines, which, owing to the annual reduction of the vintage, they were no longer able to supply from native sources, began importing wines from all parts of the Mediterranean and the Levant. They also turned their attention to the dried currants, which they found produced an excellent wine for blending purposes by an addition to the dried fruit of three or four parts of water. This industry once started, annually assumed considerable development, as the French wine growers seemed at first quite unable to cope with the phylloxera, which was slowly but surely extending in all directions, and which, before the reconstitution of the French vineyards commenced, had reduced the total French vintage from 70,000,000 hectolitres to 35,000,000 hectolitres. France, which in 1877 only imported direct from Greece 881 tons, rose in 1889 to the first rank as an importer of dried currants, having purchased direct 70,401 tons, against 51,676 tons imported in the same year by Great Britain.

The following table gives the total currant crops from 1877 to 1893, with the amounts imported annually by France:—

Year.	Total Currant Crop.	Amount Imported by France.	Table of currant crops and annual amounts imported by France.
	Tons.	Tons.	
1877	82,181	881	
1878	160,004	9,086	
1879	92,311	19,087	
1880	92,337	20,999	
1881	121,994	30,315	
1882	109,408	26,282	
1883	114,980	24,815	
1884	129,268	39,193	
1885	118,237	37,730	
1886	127,570	45,000	
1887	127,161	37,438	
1888	152,965	43,639	
1889	152,256	70,401	
1890	147,024	40,018	
1891	153,997	40,856	
1892	122,583	20,527	
1893 (estimate)	170,000	3,500	

Thus it will be seen that from the year 1879 to 1891 France imported all the surplus of the currant crop which was not required by Great Britain, the United States, and Germany for eating purposes, and that at prices ranging between 15*l.* to 20*l.* per ton f.o.b., which are most remunerative to the currant grower. This naturally gave a great stimulus to the cultivation of currants stimulated.

of the currant vine; everything else was neglected. Olive groves were cut down to make place for the currant plants, hill-sides were cleared of scrub to receive it, and the peasantry from the mountain districts of the Morea, who had hitherto led a pastoral life, all flocked down to the plains of Achaïa, Elis, and Messenia, acquired land, and transformed it into currant plantations. The profits earned during the years of plenty, instead of being partly put aside against an evil day, were all turned into currant lands, and during the years 1878 to 1884 the area under currant cultivation must have increased by one-third. Assuming that the currant vine requires 6 years to 7 years to come into full bearing, this accounts for the enormous increase observable in 1888 and subsequent years. All was now going well for the currant grower, who imagined that a golden age had set in for him, but the French vine growers having meanwhile shaken off the apathy of despair which had seized them, began seriously to combat the phylloxera. Remedies were found against the malady, new kinds of vines which were not liable to it were imported, and gradually and surely the reconstitution of the French vineyards recommenced.

Increase of
import duty
on currants
imported into
France.

In 1890 the French wine producers began to clamour against the competition of foreign wines and wines made from currants, and were finally successful in getting a Law passed through the French Chambers, which came into force on February 1, 1892, increasing the import duty on currants from 6 fr. per 100 kilos., which it had been before, to 15 fr. per 100 kilos., and also making it obligatory upon all makers of wine from currants to label it as such upon all casks, bottles, or other receptacles which they sold containing it.

Decrease of
importation of
currants into
France

This was the first serious blow which the currant trade with France received; currant wine-makers in France complained that they could no longer sell the article; many establishments were closed, and the importation in 1892 fell to 20,000 tons, but this was not so much felt in this country as the peronosporos had destroyed a considerable portion of the currant crop, which, therefore, only totalled about 122,000 tons, and, taking the amount imported by France into consideration, was just about the amount required for the consumption of the world.

Currant crop
of 1893

This year (1893) matters, however, were very different. France had an enormous and fine vintage, and required no currants, whereas Greece, which also produced the unprecedentedly large currant crop of 165,000 tons to 175,000 tons, would have liked to sell France at least 60,000 tons to 70,000 tons.

Price of
currants very
low.

Owing to this very large surplus the price of currants opened unusually low in the month of August, but the supply so far exceeded the demand, and the anxiety of growers to sell their produce was so great, that prices fell rapidly all through the autumn, and at this time currants of fairly good quality are offered at about 4s. to 4s. 6d. per cwt. f.o.b., in barrels and boxes, without being able to find buyers, as most markets of consumption are already fully supplied. About 55,000 tons to 60,000

tons of currants still remain in Greece, and it is difficult to see what is to become of this enormous surplus.

Thus Greece, this year, with an enormous crop of currants of 165,000 tons, even supposing the surplus were all to be sold, will only realise for it, taking an average of about 7*l.* per ton f.o.b., 1,155,000*l.*, against over 2,000,000*l.* realised in 1892, with a crop of 122,000 tons. A continuance of this state of things would very soon bring about the ruin of all classes engaged in the cultivation of the currant, as the equivalent of 4*s.* 6*d.* per cwt. f.o.b. is about 50 dr. per 1,000 lbs. to the producer, whereas the cultivation and other expenses (not including interest on the value of property) of producing 1,000 lbs. of dried currants is fully 70 dr.

It being feared that this state of things will be permanent, for the French demand is not likely to revive, nor are the currant crops likely to diminish, unless proprietors abandon their vineyards altogether, which seems a pity when the expense and labour incurred are taken into consideration, many remedies for the existing evil state of things have been suggested, but none seem likely to be of any use beyond the one recommended by the Committee appointed by the Greek Chambers to study the question, and that is, that the Government, early in August of each year, should obtain from all the currant districts an exact estimate of the growing crop, and then retain, when the fruit is exported, such a percentage as would bring the amount exported for eating purposes to the average annual consumption of the world for the preceding 5 years. The amount retained by the Government, or by a company formed for this purpose, to be turned into pulp, or otherwise rendered useless for eating purposes, and sold by auction to distillers and winemakers.

Remedies suggested to improve position of currants.

The Greek Government, it would seem, has adopted this recommendation of the Committee, and some measure drawn out on the above lines, is therefore soon likely to become law, and will it is expected have the effect of considerably enhancing the value of currants.

The shipments of currants during the last year to the various markets of consumption, compared with those of 1892, were:-

Shipments of currants.

Country	Quantity	
	1893	1892
	Tons.	Tons.
To United Kingdom	60,694	53,975
United States	14,466	13,211
Canada	1,079	1,328
France	8,187	8,439
North of Europe	20,041	10,344
Trieste	3,414	2,188
Russia	1,131	51
Australia	834	1,473
Italy	..	..
Total	104,886	91,009

Increase in
quantity
exported to
north of
Europe
Prices of
currants

The only satisfactory feature in the foregoing comparative table of currant shipments is the enormous increase in the quantity exported to the north of Europe, where the very low prices prevailing seem to have stimulated consumption.

The prices of currants, compared to those realised in 1892 for the various growths, were as follows:—

Growth.	Per Cwt. f.o.b.		
	1892.	1893.	
		August.	December.
	£ s. d.	£ s. d.	£ s. d.
Choicest Vostizza	1 13 0	1 2 0	0 15 0
Fine "	1 4 0	0 16 0	0 12 0
Choice Patras	1 3 0	0 15 0	0 10 0
Fine "	1 0 0	0 13 0	0 8 0
" provincial	0 18 6	0 10 0	0 7 0
Average provincial	0 16 6	0 9 0	0 5 0
Pyrgos and Calamata	0 14 6	0 8 0	0 4 6

Shipments of
currants to
United
Kingdom.

Shipments of currants to the United Kingdom during the past 5 years were:—

Year.		Quantity.
		Tons.
1889 .. ..	.. ..	49,835
1890 .. ..	.. ..	58,816
1891 .. ..	.. ..	61,850
1892 .. ..	.. ..	53,887
1893 .. ..	.. ..	60,694

Value of exports by British vessels during the last 5 years were— Value of all exports by British shipping.

Year.						Value.
						£
1889..	..	..	..	..	..	1,080,200
1890..	..	..	..	..	..	1,159,040
1891..	..	..	..	..	..	1,374,000
1892..	..	..	..	..	..	1,282,000
1893..	..	..	..	..	..	848,942

These include shipments to all parts of the world, and comprise currants, sultanas, valonea, &c.

About 1,000 tons were produced in the Morea, of which about Sultanas. 750 tons at Nauplia and Argos, and the remainder in the Corinth district and in Thrypphylia. Prices at the opening of the season ranged between 1*l.* to 1*l.* 5*s.* per cwt. f.o.b., according to quality, but the very low prices of currants affected this article also, and it declined to about 12*s.* to 15*s.* per cwt. f.o.b. About 200 tons are still unsold in Nauplia.

The quality of the Greek sultana is very fine, and colour bright; it is, therefore, much prized in the English and American markets.

The vintage was very abundant, and of good quality. Owing Vintage. to the low prices of dried currants, many growers turned their fresh currants into wine and spirits.

Several large establishments have been started in this neighbourhood, which make very good wines of all descriptions, and considerable quantities are exported to all parts of the world. Light white wine, somewhat similar to white French Burgundy, is obtainable at 6*d.* a bottle, and red wine of the character of claret at the same price.

Wine makers pay a tax of 2 *l.* an oke, or, say, about $\frac{1}{2}$ *d.* per gallon on wine made and consumed locally, but when it is exported this amount is returned to them, so that exporters of wine pay no tax whatever.

In order to encourage the consumption of currants locally, Brandy. the Greek Government has taken off the excise duty on distillation of alcohol, distillers being quite free. No duty is levied on brandy exported, and this branch of trade is assuming considerable development. The fresh, as also the dried currants, containing much sugar, produce excellent brandies (cognac), with a pleasant aroma, and when kept a few years they are much superior to the cheap French cognacs, so much used in the Levant, Egypt, &c.

Good cognac, two or three years old, made entirely from the Price of juice of grapes or currants, can now be obtained in all parts of brandy. Greece at from 1*s.* 6*d.* to 2*s.* 6*d.* a bottle. Large quantities are now sent to Egypt, where the Greek brandy is coming into favour.

With excellent raw material ready at hand at very low prices, and perfect freedom to exercise their calling without any interference from Government officials and without any tax whatever, distillers in this country should be able to establish a large, profitable, and permanent trade.

Valonea.

This crop was very short, the oak trees (*Quercus ægilops*) in Acarnania having suffered from some kind of blight, which caused the acorns to drop off before they had attained maturity.

The produce of the various districts compared to last year was as follows :—

District.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Acarnania and Etolia	200	1,500
Maina (Laconia)	1,000	1,200
Cape Papa (Achaia)	100	1,000
Total	1,600	6,700

Prices have ruled at 8*l.* to 10*l.* per ton f.o.b., as quality of this year's produce was very poor.

The principal portion of this year's crop was shipped to Trieste, and the remainder to the United Kingdom, where it is used for tanning purposes.

Olive oil crop.

The olive oil crop was extremely abundant in all parts of Greece and the islands, and although the quantity of olive oil usually produced is only sufficient to supply the local consumption, there will be this year a considerable quantity available for exportation.

Price of olive oil.

Owing to the great want prevailing amongst the agricultural classes, proprietors have been compelled to sell their oil at extremely low prices, say, equivalent to 23*l.* 10*s.* or 24*l.* 10*s.* per tun of 256 gallons, f.o.b., in casks, which is the lowest price done for many years.

Olives.

Olives were also abundant. The trade in this article with the United States is increasing annually. About 2,000 casks of the large black olive, produced at Salona in the olive groves situate below Parnassus, pickled in brine, were shipped to New York.

Grain crops.

The grain crops were unusually abundant throughout Greece, and this has, to a certain extent, alleviated the position of the currant growers and peasantry in general, who, with few exceptions, possess plots of land in the plains and near their villages in the mountain districts, where they grow maize and wheat for their own wants.

Prices of cereals.

Prices ruled as follows :—

Articles.				Price.		
				£	s.	d.
Wheat	...	...	Per imp. quarter	2	6	0
Barley	...	...	" "	1	7	0
Oats	...	...	" "	0	15	6
Maize	...	...	" "	1	8	0
Potatoes	...	...	" "	0	12	6

The quality of potatoes is very inferior, and as potatoes and seed are not allowed to be imported from abroad, owing to the danger of their carrying the germs of phylloxera, the local kinds are yearly deteriorating. Quality of potatoes inferior.

The importation of cereals to this port during the past year was:— Imports of cereals to Patras.

From—	Articles.	Quantity.
		Chilos.*
Russia	Wheat	500,000
Thessaly	"	120,000
Turkey	"	80,000
Other parts of Greece ..	Maize, barley, and oats (about)	85,000

* A chilo is about 60 lbs. English.

No steam ploughs or other improved agricultural implements are employed in the Morea, the cultivation of grain crops being carried on very much in the same style as was no doubt practised in the days of Hesiod. Cultivation of grain crops.

This was also a fair crop. The principal portion of the tobacco produced in the Morea is grown in the neighbourhood of Nauplia and Argos, and is exported almost entirely to Holland. Tobacco.

The quality is poor, and is mostly used for blending purposes.

The total produce of Nauplia and Argos amounted to 900,000 okes (2,520,000 lbs.), and is valued, on an average, at about 1 dr. per oke, say, at 2½d. per lb. English.

Figs were produced principally in Messenia. The crop this year amounted to close upon 12,000 tons, the greatest portion of which was exported to Trieste and Russia. Prices ruled at from 8l. to 10l. per ton f.o.b. Figs.

The quality of the dried Greek fig is much inferior to the Smyrna, and consequently very few are sent to England.

Imports.

In consequence of the great rise in exchange and high cost of bills on England, and owing also to the great commercial depression existing in this district, and in this country generally, Decrease in value of imports.

the value of British goods imported to this port by British vessels direct only amounted to 128,665*l.*, against 176,620*l.* in 1892 and 278,700*l.* in 1891.

Reason for
decrease in
value of
imports.

Unless some improvement takes place in the currant trade, the importation of goods from foreign countries cannot increase, as the currant is the principal staple produce of the country, and unless it can be sold at remunerative prices by the growers, it is natural that the consumption of foreign imported articles should decrease.

Prices of
imports.

The following have been the ruling prices of goods imported, duty paid, compared with those of the previous year, viz. :—

Articles.		Price	
		1893.	1892.
		£ s. d.	£ s. d.
Maddapolams	Per piece of 40 yards ..	0 16 0	0 15 0
" prints	Per piece of 20 yards ..	0 9 0	0 8 9
Cotton, water twist, Nos. 1½ ..	Per 10 lb. bundles ..	0 10 6	0 9 3
Grey T-cloth	24 yards, 6½ lbs. ..	0 5 0	0 6 10
"	24 yards, 7½ lbs. ..	0 7 0	0 7 10
Lead	Per cwt. ..	1 2 0	1 1 3
Sugar (in bags)	" ..	2 0 0	2 2 2
" (in casks)	" ..	2 4 0	2 15 0
Coffee	" ..	6 0 0	6 15 9
Pepper	" ..	2 16 6	3 15 9
Alum	" ..	0 9 3	0 8 10
Iron bars	" ..	0 8 10	0 8 0
" hoops	" ..	0 8 10	0 8 4
" sheets	" ..	0 12 0	0 11 7
" Swedish	" ..	0 12 0	0 11 7
Copper sheets	" ..	4 10 0	4 14 9
Tin (in bars)	" ..	6 8 0	8 8 0
" in plates (TC)	Per box ..	0 15 6	0 17 6
Dry hides	Per cwt. ..	4 10 0	5 14 9
Red herrings	Per half barrel ..	0 15 0	0 15 6
Coals	Per ton ..	1 2 0	1 2 0
Salmon	Per tierce ..	5 10 0	5 15 0
Codfish	Per cwt. ..	0 16 0	0 18 0
Rice	" ..	1 1 8	1 1 0
Rum	Per gallon ..	0 11 6	0 10 6
Petroleum (Government monopoly)	Per case ..	0 15 0	0 15 0
Indigo	Per cwt. ..	5 10 0	5 11 0

The above sterling prices are obtained by turning the drachma into English currency at the rate of 40 dr. per 1*l.*, which is about the average rate for the year.

Coal

The amount imported was 12,798 tons against 19,848 tons in 1892, of which 11,698 tons were of British origin and 1,100 tons were German; the principal importers are the local gas company,

the Athens-Patras and Pyrgos Railway Company, and two or three flour mills.

Codfish is all imported from the Coast of Labrador and New-foundland. The amount landed at Patras during the past year was 24,489 quintals against 19,247 quintals in 1892. All came in British bottoms, 6,000 quintals by steam and remainder by sailing vessels.

Codfish, amount of imports.

Dried Labrador codfish is a very favourite article of diet amongst the lower classes in this country, and the consumption up to 1892 had been increasing annually, but in 1893 it fell off considerably owing to the bad result of the currant crop and the consequent poverty prevailing amongst the peasantry.

Codfish, a favourite article of diet.

The import duty on codfish is extremely high, say 6s. per quintal or 50 per cent. of the value of the article, which usually sells at from 14s. to 18s. per quintal duty paid. This high duty also tends to restrict the consumption of this article, which is one of the principal of British imports into Greece. A considerable stock from imports of 1893 is still unsold.

Heavy import duty on codfish.

Petroleum is a monopoly of the Greek Government, which imports its requirements from New York. Last year 56,000 cases were brought by British steamers to Patras. Each case contains 2 tins of 4 gallons each and is sold by the Government at 15s. per case.

Petroleum : Government monopoly.

Lead is now no longer imported from Great Britain, as local dealers are able to obtain their supplies cheaper from the mines of Laurium.

Lead no longer imported.

Rum is also no longer imported from abroad, as the import duty is extremely heavy, and no spirits imported can compete with the cheap brandies and other spirits manufactured in the country. The import duty on brandy, rum, whisky, &c., is about 4s. 6d. to 5s. per gallon, whereas brandy manufactured in the country is sold for about the same price.

Rum.

The value of imports by British vessels during the last 5 years was:—

Value of imports by British vessels.

Year.						Value.
						£
1889..	..	..	..	..	..	210,660
1890..	..	..	..	..	..	217,240
1891..	..	..	..	..	..	278,700
1892..	..	..	..	..	..	176,620
1893..	..	..	..	..	..	128,665

This falling-off in the value of imports is not confined to British goods only, but is shared by all countries alike, for the enormous rise in the exchange, and the great and sudden fluctuations of the rate during the past year have quite demoralised trade.

Decrease in value of imports not confined to British trade only.

There occurred, besides, many commercial failures in this (1695)

B

Commercial failures.

district during the early part of last year, owing to over-trading and serious losses in the currant trade. All this combined with the general commercial and financial depression prevailing throughout the country caused great distrust, and all operations with foreign countries were brought to the lowest possible level.

Exchange.

Ruling rates
of exchange.

The rate of exchange ruled enormously high last year, and as said above was a great check on the importation of goods of all kinds.

Taking the par of exchange at 25 dr. to the £, it will be seen from the following table that the premium on three months date bills on London occasionally rose above 70 per cent., and fluctuations were often so rapid that within the same week there have been variations in this premium of 5 per cent. and over.

Month.	For 3 m/d Sterling Bills.	
	1893.	1892
	Dr. £.	Dr. £.
January	38 50	34 0
February.. .. .	38 0	35 0
March	36 0	37 0
April	35 20	36 0
May	40 0	34 0
June	38 30	38 50
July	39 50	34 0
August	41 20	34 50
September	43 0	34 50
October	43 50	35 0
November	41 0	35 70
December	41 30	38 50

It is much to be feared that the rate of exchange will not decline to any extent, unless the finances of this country are re-established on some sounder basis.

Public Works.

No public works of any importance have been carried out in this district during the past year, and it is not likely that anything fresh will be attempted in this direction until the finances of the country recover strength.

Branch
railway from
Diakofto to
Kalabryta.

This branch line of the Athens-Patras-Pyrgos Railway will, it is expected, be completed during the present year. It will bring Kalabryta within about two hours of the main line, and will enable tourists to visit the famous monastery of Megaspilaion, which is at present not easy of access.

This short line which branches off at Diakofto, on the Gulf of Corinth, traverses very beautiful mountain scenery.

The junction of the two lines has now been accomplished, passengers from Athens for Olympia and vice-versa, perform the journey without change of carriages.

The railway company has built a large hotel at Olympia, where visitors will find a much greater degree of comfort than they have hitherto been accustomed to.

Unfortunately the line is not by any means a financial success, its shares, whose original value was 250 dr., having declined to 60 dr.

This line which was intended to join the important Port of Calamata to Tripolitza has been definitely abandoned, owing to the failure of the contractors, notwithstanding the large amount of work already done. This is much to be regretted as it formed an important part of the scheme for connecting the Morea by a network of railway lines.

This line is still in operation, although the annual loss to the Greek Government is said to be considerable. In connection with this line a steamer leaves Patras twice a day, crosses the Gulf in an hour and a half to Krioneri, where passengers find the train awaiting them, and are able to visit Missolonghi and Agrinion and return to Patras within the day.

A very fine thermal bath establishment was opened during the past year at Lindzi, near Clarenza, on the site of the old Roman baths.

The waters, which contain sulphur, iron, and other minerals, have been renowned from the olden days for their efficacy against rheumatism and all skin diseases.

The hotels and bathing establishment are extremely well arranged, and were visited last spring and summer by hundreds of invalids from all parts of Greece and the Levant.

Provisions.

Provisions have been less abundant, prices were about:—

Articles.	Price per lb. (English.)
	<i>d.</i>
Beef	7
Mutton	7
Lamb	8
Pork	6
Vegetables	2
White bread	2
Brown "	1½

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AND FINANCE.

G R E E C E.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF THE CYCLADES.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1204.

*Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.*

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1289. Manila	2d.	1349. Cherbourg	1d.
1290. Bahia	1d.	1350. Jerusalem	1d.
1291. Munich	1d.	1351. Santiago	1d.
1292. Trieste	1d.	1352. San José	1d.
1293. Tunis	1d.	1353. Trieste	3d.
1294. Montevideo.. ..	1d.	1354. Madrid	2d.
1295. Belgrade	2d.	1355. Teneriffe	1d.
1296. Teneriffe	1d.	1356. Havana	2d.
1297. Stettin	3d.	1357. Paraguay	5d.
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G R E E C E .

SYRA.

Consul Cottrell to the Earl of Kimberley.

My Lord,

Syra, April 1, 1894.

I HAVE the honour to transmit to your Lordship the enclosed Report on the Trade and Commerce of the Cyclades during the year 1893.

I have, &c.
(Signed) W. H. COTTRELL.

Report on the Trade and Commerce of the Cyclades for the Year 1893.

ABSTRACT of Contents.

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Trade and Commerce.

Condition of
trade.

The condition of trade in the Cyclades during the year 1893 was more depressed than in the preceding year, owing to an unexampled depreciation of the forced currency, which has reached of late quite an appalling proportion, manifestly paralysing all commercial operations.

Financial
crisis.

The severe financial crisis under which the country has been labouring for the last few years, and which has seriously impaired the trade and industry of Greece in general, as well as credit abroad, shows up to the present no signs of amelioration or abatement. And though in a great measure confined to the capital, which is the centre of speculation in stocks and shares in Greece, this financial distress extended its baneful influence to every commercial port in Greece without exception.

There is hardly an industry in the country that has not been more or less affected by it, and in consequence felt harassed and disturbed.

Competition and enterprise have either been hampered or checked in some degree, and the prices of nearly every article of primary necessity have been enhanced, amounting to ruin to many individuals, and to an economic revolution in business all round.

Syra, which formerly occupied a prominent place as a centre of navigation, has, however, been seriously affected by the failure in March last of the Hellenic Steam Navigation Company, which has been its main support for over 30 years.*

Exchange.

The average monthly rates of exchange on bills drawn on London at 3 months after date were during the year 1893 as follows :—

Month.				Rate per <i>l.</i> Sterling.	
				From—	To—
				Dr. <i>l.</i>	Dr. <i>l.</i>
January ..	..	..	..	38 10	39 20
February ..	..	..	..	36 50	37 50
March ..	..	..	..	35 0	37 25
April ..	..	..	..	35 0	39 90
May ..	..	..	..	39 85	44 0
June ..	..	..	..	39 0	40 20
July ..	..	..	..	40 0	42 0
August ..	..	..	..	41 20	42 50
September ..	..	..	..	44 50	46 0
October ..	..	..	..	44 0	44 60
November ..	..	..	..	39 0	42 50
December ..	..	..	..	41 50	42 50

					Dr. <i>l.</i>
Mean rate for 1893 ..	..	..	..	..	40 49
" " 1892 ..	..	..	..	..	36 10
" " 1891 ..	..	..	..	..	32 75

* See "Shipping and Navigation."

The rise in the rates during the month of May was owing to the change of Government, and the subsequent fluctuations noticeable up to September, when the proportions rose to the unprecedented figure of 46 dr., were owing to the uncertain character of the negotiations made by the Government for the raising of a new loan of 4,000,000*l*.

It is evident that such rapid fluctuations in the rates of exchange as above quoted could not fail to produce a serious disturbance in all commercial transactions with foreign countries, consequent upon an inducement to retard payments, in the hopes of gaining advantage by a fall in the rates of exchange, and to cause the general stagnation of trade now prevalent.

RETURN of the Principal Articles of Export from Syra during the Years 1893-92.

Articles.	Value.	
	1893.	1892.
	Drachmæ.	Drachmæ.
Tobacco	431,954	518,550
Emery-stone	80,980	86,250
Leather	200,000	355,550
Vallonea	14,168	120,475
Oil	2,678	12,150
Sponges	25,000	19,100
Cheese	3,290	50,250
Olives	1,579	4,075
Fresh vegetables	50,000	37,500
Citrons in brine	1,770	4,050
Wine	9,449	35,500
Rags and bones	5,498	12,875
Butter	1,508	4,500
Dry fish	29,895	49,325
Cereals	34,224	161,075
Gunpowder	133,170	157,475
Confectionery	188,287	70,275
Silk	3,560	42,000
Millstones	28,000	19,400
Cotton yarns	13,773	..
Other articles.	254,932	132,900
Total	1,563,715	1,893,275
Equivalent in sterling £	38,647	52,446

The paper currency has throughout this report been converted into sterling at the mean rate for the year, viz., 40 dr. 49 l. to the 1*l*. This has been resorted to with the object of giving more accurate values than was done on previous occasions, when the currency was converted at the rate of 25 dr., for mere comparison with other years.

Exports.

Properly speaking Syra exports only vegetables and leather which are generally sent to Turkey. All the other goods figuring in the above list of exports are the produce of other parts of Greece, Crete, and Asia Minor, which pass through here in transit. Transhipment also takes place from small craft, which arrive from the outlying islands on to the steamer direct. This renders the information respecting the values of exports somewhat unreliable.

Market
prices on
articles of
export.

The following table shows the average ruling prices of the principal articles of export, compared with those of the previous year :—

Articles.		Prices.			
		1893.		1892.	
		From—	To—	From—	To—
		£ s. d.	£ s. d.	£ s. d.	£ s. d.
Leather-Syra manufacture) ...	Per cwt. ...	4 19 0	7 14 0	5 0 0	5 18 0
Tobacco, leaf	" ...	1 4 0	6 12 0	1 18 0	3 16 0
Citrons, in brine	" ...	0 10 6	0 14 3	0 10 0	0 16 0
Vallonia	Per ton ...	8 0 0	10 10 0	9 10 0	10 12 0
Emery-stone	" ...	2 10 0	3 0 0	3 0 0	5 0 0
Olive-oil	Per gallon ...	0 1 11	0 2 3	0 4 0	0 6 0
Wine... ..	" ...	0 0 10	0 1 0	0 1 0	0 1 6

SYRA.

5

RETURN of Principal Articles of Import to Syra during the
Years 1892-93.

Articles.	Value.	
	1893.	1892.
	Drachmæ.	Drachmæ.
Manufactures	760,450	3,997,450
Hides	1,750,700	1,636,900
Grain and pulse.. .. .	937,023	966,600
Yarns	293,831	308,000
Salted fish	305,453	421,025
Rice	157,445	224,475
Iron	470,400	126,825
Coal	488,350	1,440,000
Glassware	12,085	19,900
Sugar	179,000	193,325
Lumber	188,416	274,800
Livestock	36,600	106,075
Copper	51,905	107,350
Coffee	150,175	211,750
Ready-made clothes	..	266,125
Hats	44,458	27,250
Caviare	43,408	132,775
Butter	38,040	93,825
Paper	55,328	137,125
Tannins	189,225	395,800
Rope	11,393	8,225
Gunpowder	19,000	16,725
Spices	4,050	25,125
Cheese	9,225	70,475
Cigars	..	1,400
Tobacco (leaf)	40,000	62,500
Wine, beer, and spirits.. .. .	33,000	22,325
Oils	31,630	108,600
Dyes	52,223	88,350
Other articles	1,458,237	2,086,575
Total	7,811,050	13,527,675
Equivalent in sterling £	192,914	374,728

The figures in the above table speak for themselves of the significant decrease in foreign trade.

A large proportion of imports is re-shipped to the neighbouring islands and the mainland.

The average ruling prices of certain goods imported, compared with those of the previous year, were as follows:—

Articles.			Prices			
			1893.		1892.	
			From—	To—	From—	To—
			£ s. d.	£ s. d.	£ s. d.	£ s. d.
Wheat ...	Per cwt. ...		0 7 8	0 8 9	0 8 0	0 8 6
Barley ...			0 4 5	0 5 6	0 4 0	0 4 6
Sugar ...			1 19 6	2 4 0	0 19 6	1 5 0
Coffee ...			8 6 6	6 17 6	4 0 0	4 10 0
Rice ...			0 15 5	1 0 11	0 10 0	0 14 0
Rum ...	Per gallon		0 2 6	0 3 0	0 1 9	0 2 6
Herrings ...	Per barrel		0 15 0	1 7 6	0 10 0	1 0 0
Codfish ...	Per cwt. ...		1 5 0	1 10 0	1 2 0	1 5 0
Hides—						
Wet ...			2 8 5	3 10 5	2 0 0	2 10 0
Dry ...			2 8 5	7 3 0	1 10 0	3 0 0
Coal, Welsh ...	Per ton ...		0 19 0	1 0 0	0 15 0	0 19 0
Iron—						
Pig ...	Per cwt. ...		0 2 6	0 3 7	0 4 6	0 5 0
Bar ...			0 7 3	0 8 10	0 9 0	0 10 0
Sheet ...			0 8 10	0 10 6	0 10 0	0 12 0
Steel ...			0 17 6	0 18 0	0 18 0	0 19 0
Gunpowder ...	Per barrel		0 9 0	0 9 6	0 9 0	0 9 5
Grey T. cloths ...	Per 24 yds.		0 4 0	0 6 0	0 6 0	0 7 0
Cotton prints ...	Per yard		0 0 2½	0 0 4	0 0 4½	0 0 5
Madapolams ...	Per 38 yds.		0 7 0	0 10 0	0 8 0	0 12 0
Water-twist, cotton ...	Per 10 lbs.		0 5 0	0 6 0	0 7 0	0 8 0

TABLE showing the Total Value of all Articles Exported from Syra and Imported to Syra to and from Foreign Countries during the Years 1892-93.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.
Great Britain ..	19,900	98,175	3,137,156	6,155,875
Turkey ..	1,313,440	1,425,926	370,446	1,780,350
Egypt ..	..	3,575	..	19,625
Germany ..	34,302	28,825	1,661,449	827,200
Russia ..	43,612	107,225	1,001,240	945,125
Holland ..	7,041	..	2,150	5,850
Roumania ..	..	12,775	1,650	65,700
Austria ..	1,268	18,550	557,649	1,220,725
Cyprus ..	..	109,000	..	..
France ..	113,590	87,100	964,244	2,345,175
Italy ..	1,220	..	100,516	162,050
America ..	..	..	14,550	..
Africa ..	29,842	575	..	..
Japan ..	..	1,550	..	..
Total ..	1,563,715	1,893,275	7,811,050	13,527,675
Equiv. in sterling £	38,647	52,446	192,914	374,728

Imports from
Great
Britain.

The total value of imports from Great Britain last year was less by almost half that of 1892, consisting chiefly of the following:—

Articles.	Value.	
	1893.	1892.
	Drachmæ.	Drachmæ.
Manufactures	638,977	1,993,075
Coal	488,350	1,440,000
Yarns and threads	289,830	828,000
Turpentine, oleo-resins ..	186,570	400,000
Salted and dried fish ..	263,843	272,375
Solder	9,780	240,850
Chemicals in general	496,464	203,250
Iron (wrought and unwrought)	423,000	100,000
Copper, brass, and zinc ..	49,640	115,100
Rice	82,245	112,750
Sack and sail cloths	87,855	71,350
Cochineal, dyes, and paints ..	26,620	46,700
Coffee	6,600	40,250
Pitch and tar	20,000	20,075
Gunpowder	19,000	12,225
Hides	6,000	7,250
Earthenware and glass	12,000	32,400
Varnish	..	101,175
Sugar	..	56,475
Fire-arms and cutlery	..	26,000
Other articles	30,882	36,575
Total	3,137,156	6,155,875
Equivalent in sterling £	77,480	170,522

The enormous decrease in the importation of coal last year was Coal. owing, besides the general depression of trade, to the failure of the Hellenic Steam Navigation Company of Syra, which was in abeyance for nine months, and to the coal strikes at home.

The receipts of the custom-house in 1893 amounted to Custom-house receipts. 1,937,942 dr., which at 40 dr. 49 l. to the l. represent 47,863l.

Mention was made in the last report from this consulate of the readiness and keenness of German agents to secure any possible chance of business, irrespective of dimensions or character. The amount of progress achieved by German trade in the Cyclades was more accentuated during the past year. The increase of German imports more than double the amount of the preceding year, in spite of the high duties and the excessive premium on gold, which to other traders afforded an almost unsurmountable difficulty, show that German trade is slowly but surely making its way, and even attaining large proportions. Progress of German trade.

The co-operative society, "Export Verband," recently established in Berlin, representing 75 German manufacturing houses, principally dealing in machinery, hardware, cordage, &c., will establish an agency at Syra, as well as several other central ports of Greece. A permanent exhibition of its different products is in existence at Athens.

Although Great Britain still holds the largest share of commerce, the fact must not be disregarded that her trade with Syra has been steadily declining during the past 6 or 7 years. On

GREECE.

the other hand, British merchants and manufacturers must not make light of the result of this German competition, which, unimportant as it may seem to be as compared with that of Great Britain, may, thanks to the proverbial adaptability and persistent energy displayed by the German trader, eventually prove more disastrous than hitherto imagined.

The main obstacles which, in the opinion of the merchants, is causing British trade to diminish, are the very high freights, packing expenses, insurance, commission, and such like disbursements, which added to the original cost of the articles renders sale almost an impossibility; whereas the lower prices at which Austria and Germany offer their goods, the comparatively trifling expenses accompanying them, and the great facility of the long term of payment, have succeeded in shutting out of these markets British goods.

It is strongly recommended that such useful publications as the "Buyers Guide," issued by the British Publishing Company, and catalogues of good British firms should, in future, be also made in the French language and the metrical system of units employed. From a business point of view it is unfortunate that our language is so little known out here, whereas French is understood by everybody in commercial circles; and it is feared that Great Britain and Ireland are deprived of many a good order owing to the difficulty of comprehension, by foreigners of the prices, weights, and measures in our English catalogues.

Shipping and Navigation.

RETURN of all Shipping at the Port of Syra during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	143	139,302	143	139,302
Greek	1,670	33,400	26	135,809	2,196	269,200
French	...	...	43	40,739	43	40,739
Turkish	192	4,066	70	24,724	262	28,790
Austrian	1	116	3	32,026	34	32,142
German	...	...	23	23,372	23	23,372
Italian	2	206	2	295	4	501
Russian	...	...	1	68	1	68
Norwegian	...	...	1	385	1	385
Total	2,123	37,788	304	416,112	2,427	453,900
.. 1892	1,844	35,000	1,018	196,892	2,862	231,892
.. 1891	2,027	68,462	1,205	949,160	3,232	1,017,622

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.]
British ...	...	...	143	133,332	143	133,332
Greek ...	1,935	53,000	528	158,789	2,463	208,789
French ...	...	...	43	49,739	43	49,739
Turkish ...	142	3,918	70	24,724	212	28,642
Austrian ...	1	116	53	52,626	54	52,742
German ...	...	...	25	29,432	25	29,432
Italian ...	2	206	2	297	4	503
Russian ...	...	...	1	68	1	68
Norwegian ...	...	...	1	385	1	385
Total ...	2,080	57,240	866	446,392	2,946	503,632
" 1892 ...	1,811	63,303	1,366	732,154	3,247	795,457
" 1891 ...	2,649	70,268	1,291	916,882	3,840	986,140

Besides the vessels noted in the above tables, 39 men-of-war, *Men-of-war.* of which 22 were British, called at this port during last year. The visits of men-of-war, particularly British, are always looked for with eagerness in this town for the profit derived therefrom on coals, provisions, and other supplies.

RETURN of British Vessels which Entered and Cleared the Port of Syra during the Year 1893.

ENTERED.

Trade.				Number of Vessels.	Tons.	Crews.
Direct ..	..	..	..	84	111,891	2,713
Indirect ..	..	..	..	59	21,441	1,143
Total ..	..	..	..	143	133,332	3,856
" 1892 ..	..	..	..	149	141,733	4,483
" 1891 ..	..	..	..	153	149,788	4,598

CLEARED.

Trade.				Number of Vessels.	Tons.	Crews.
Direct ..	..	..	..	44	55,778	1,422
Indirect ..	..	..	..	99	77,554	2,434
Total ..	..	..	..	143	133,332	3,856
" 1892 ..	..	..	..	149	141,733	4,483
" 1891 ..	..	..	..	152	149,619	4,586

Of the 84 vessels which entered with cargoes from Great Britain and the colonies, 80 were steamers which arrived here from London, Liverpool, and Malta, and which, after discharging a portion of their cargo destined for this place, proceeded to other *Direct trade.*

ports with the remainder, and 4 were steamers from Cardiff and Newcastle laden with coals.

Of the 44 vessels cleared, one was from Constantinople which shipped emery-stone for Great Britain, and the rest, although proceeding to Turkish and Russian ports of discharge in order to complete their outward voyage, shipped merchandise for Great Britain.

Indirect
trade.

Of the 59 steamers which entered, 44 were small trading boats plying regularly between Smyrna, Syra, and the coast of Asia Minor; 10 were steamers belonging to a new line plying between Constantinople, Syra, and Crete; 2 steamers belonging to the Eastern Telegraph Company, employed in submarine cable operations in the Levant; 1 from Belgium which handled cargo in quarantine and proceeded to Seriphos to load iron-ore for Great Britain, and 1 from Marseilles which called for coals.

Of the 99 steamers which cleared, 53 were small coasting boats; 42 were steamers from the United Kingdom and other ports which left for Turkish and Russian ports, but without shipping any cargo; 2 telegraph ships; 1 steamer entered and cleared in quarantine; 1 in ballast, and 1 called for coals.

Sailing
vessels built
at Syra.

RETURN of Wooden Sailing Ships Built at Syra during the Year 1893.

		Number of Vessels.	Tonnage.	Value.	
				Currency.	Sterling.
Above 100 tons	..	15	3,051	Drachmæ. 608,000	£ 15,016
Under „	..	26	1,233	304,700	7,525
Total	..	41	4,289	912,700	22,541
„ 1892	..	33	6,373	1,593,250	44,134
„ 1891	..	47	8,322	1,692,225	51,671

The ship-builders of Syra complain of an increasing paucity of orders. For although an increase of 8 vessels over the preceding year is noticeable in the above return there is a remarkable decrease in tonnage during 1893, ship-building having been restricted to very small craft.

The larger vessels usually built at Syra consist of hermaphrodite brigs, barquentines, and schooners; the smaller craft is generally restricted to the well-known Levantine caiques.

The cost for building a hermaphrodite brig of 150 tons to 250 tons varies from 25,000 dr. to 30,000 dr., a barquentine of 275 tons to 450 tons will cost from 60,000 dr. to 90,000 dr., and the average cost of caiques is 250 dr. per ton.

Pilotage,
coaling,
water, &c.

The information contained in last year's report respecting pilotage, coaling facilities, water supply, quarantine dues, &c., remains unaltered.

Owing to the cholera scare last year, severe quarantine restrictions were adopted at this port, which had an apparent effect of decreasing foreign shipping considerably, particularly between this and Turkish ports; the total tonnage 503,900 thus compares unfavourably with the returns for the last 3 years.

The quarantine regulations which are always very strict were particularly so last year, owing to the proximity of the ports infected with cholera.

The cholera lazaretto at Delos, 12 miles to the north-east of Syra, near the Island of Mykonos, was remarkably busy during last year; no less than 293 sailing vessels and 88 steamers, with 1,955 passengers in all performed quarantine there.

The sanitary and quarantine dues at Delos amounted to 23,752 dr.

British shipping was not much affected by quarantine at Syra, and the regular lines, Cunard, Leyland, Moss, and Papayanni called alternately as before.

The "Messageries Maritimes," the "Fraissinet," and the Turkish steamers of "Courdgi," however, had stopped their calls altogether, owing to the quarantine impositions against Marseilles and Smyrna, and have only recently resumed their regular voyages.

Of British coasting vessels, two steamers respectively belonging to Joly, Victora and Co., of Smyrna, and Lambros and Co., of Constantinople, now ply regularly, the former between Smyrna, Syra, and the Syrian coast, the latter between Constantinople, Syra, and Crete.

Of the four companies with steamers plying between Piræus, Smyrna, and the islands of the Cyclades, the "Hellenic Steam Navigation Company" was formerly in a most flourishing condition, but of late became involved in serious monetary difficulties, which ultimately ended in bankruptcy in March of last year.

This company was in receipt of an annual subsidy of 650,000 dr. from the Greek Government, in virtue of a convention which expired in 1892; and in view of the financial crisis it was not renewed.

Thus the company found it impossible to cope with the growing difficulties and its increasing debt, amounting to over 3,000,000 dr.

To avert temporarily the imminent crisis, the company then decided to let their steamers and immovables out on charter to Messrs. Macdowall and Barbour, of Piræus, for a period of 10 years at an annual payment of 210,000 dr.

The steamers were duly delivered to the charterers in July last, and under their joint direction commenced running regularly as before, each steamer being gradually repaired in accordance with provisions contained in the charter-party. Some disagreement having, however, arisen later on between the contracting parties, the affairs of the company once more came to a standstill.

The company was declared bankrupt with liabilities amounting to 3,200,000 dr. and assets estimated at 2,000,000 dr., con-

Quarantine.

Delos.

Sanitary and
quarantine
dues at Delos.
Regular lines
of steamers.
British.French and
Turkish.British
coasting
vessels.Hellenic
Steam
Navigation
Company.

sisting of 10 steamers, an arsenal comprising two patent slips engine and boiler shops, foundry, stores, and all office buildings.

The ground covered by the arsenal extends to about 18,400 square metres. All kinds of repairs to machinery and hull were executed under the direction of British engineers, one of the slips being capable of raising vessels up to 1,200 tons displacement.

Nine of the steamers were sold by auction in August for the insignificant sum of 949,000 dr., which at the then current rate of exchange represents 23,146*l*. It must be noted that one of the steamers alone, the "Pelops," cost 1,000,000 dr.

New Hellenic
Steam
Navigation
Company.

A new company under the denomination of "New Hellenic Steam Navigation Company" has been formed, consisting of holders of bottomry bonds of the old bankrupt company, and others who contributed ready money for the purchase of the mortgaged steamers.

The capital of the new company has been fixed at 1,400,000 dr., consisting of 2,800 shares of 500 dr. each.

The new company's steamers are the following.

Name.	Tonnage.		Nominal Horse-power.	Builders.
	Gross.	Net.		
"Theseus" ..	1,004	632	180	Forges et Chantiers, La Seyne
"Pelops" ..	973	613	180	Royden, Th., and Sons, Liverpool
"Elpis" ..	955	606	170	Barrow, S. B., and Co., Newcastle
"Chios" ..	923	537	160	Steel and Co., Greenock
"Pinios" ..	778	490	165	Thomson, Glasgow
"Hermupolis" ..	780	493	140	Blackwood and Gordon, Port Glasgow
"Eptanisos" ..	631	349	140	Pile and Co., West Hartlepool
"Panellinion" ..	354	195	76	Henderson, Renfrew
"Hydra" ..	400	218	76	Blackwood and Gordon, Port Glasgow

Population and Industries.

Vitality
statistics.

Deaths, 17·7 per 1,000; births, 17·8 per 1,000; on estimated population of 31,560.

Industries.

In the last report mention was made that the industries of Syra, which were formerly in a flourishing condition, have for some years past been in a state of steady decline. Although this position was rather accentuated during the past year, owing on the one hand to the forced currency difficulty, and on the other to the heavy custom dues on raw materials, the industries are the same as enumerated in the above-mentioned publication.

Yarn and
cotton fabric
industries.

Special mention may, however, be made of the yarn and cotton

fabric industries, which, notwithstanding the existing trade difficulties, have recently displayed a marked improvement.

The machinery, which is wholly brought from England, has been doubled, and the demand for manufactured wares is daily increasing.

Owing to the heavy duties, raw cotton is not brought from abroad, and the local yarns are, therefore, made from material which comes from Livadia (Bœotia), which has a shorter and inferior staple to the Egyptian cotton, with which some other Greek markets are supplied. For this reason the cotton fabrics are made of Greek and English yarns intermixed, the disposition of the yarns on the looms being the following, viz., for the warp, upon which the strength of the tissue is said to depend, English yarns are employed, and the local yarns for the woof.

Several applications having on different occasions reached this Consulate for information as to the manufacture of the "Rahat Loukoums" of Syra, the genuine form of which seems to be unknown in England, it is hoped the following particulars relating thereto may not prove uninteresting.

The decline of this once flourishing industry is to be attributed on the one hand to the disturbed financial state of the country, and on the other to the heavy custom dues levied on nearly every article of import.

As a matter of fact, the price of sugar, the chief ingredient in the manufacture of this sweetmeat, is now unprecedentedly high, the custom duty on the same being 1 dr. 10 l. per oke (2·8 lbs.), which exceeds the value of the article itself.

The price of starch and flavouring essences have also increased considerably in proportion, the custom dues on the same being at present 20 l. and 5 dr. per oke respectively.

Vanilla, a favourite flavouring essence, is exceptionally dear, paying 20 dr. per oke custom duty alone. Vanilla is brought from Germany in dried pods.

Mastic, another flavouring material, is brought from Chio in semi-transparent resinous tears exuding from the mastic tree grown on that island, and is obtained by incision.

Pistachio comes from Syria in nuts or in liquid from Germany, the latter being produced from the oil of the kernel.

Chocolate is brought in cakes from France and Germany, whilst the other flavouring essences, viz., banana, rose, violet, citron, mandarine, mint, pine, almond, orange, lemon, &c., are brought in liquids from Germany.

An inferior quality of citron essence is produced locally from the rind of the Naxos citron.

The confection has up to the present been generally consumed throughout Greece, and the manufacturers are unable to increase the prices, as the Greeks will not pay more than they have been accustomed to do for so many years.

Several attempts have been made to introduce the article in England, but it has hitherto been found impossible to compete with the Smyrna produce (which is inferior in quality) on

account of its cheapness. This obstacle, however, has now been removed by the coming in force of a Bill, already passed in the Greek Chamber of Deputies, in virtue of which the Syra manufacturers are now given the option of drawing from the custom-house, free of duty, a stated quantity of sugar under guarantee that it will be returned in the shape of "Rahat loukoums" for exportation.

As stated in the trade report for the year 1892, the excellence of this confection is chiefly attributed to the water of the island, and the circumstance, illustrative of this statement, may be mentioned of some of the Syra manufacturers having attempted to establish factories at Trieste, Smyrna, and New York, but failed to produce the excellent article made here, owing apparently to the employment of a different kind of water.

"Rahat loukoums," as the words imply, are essentially of Turkish origin, the primitive article having been flavoured with otto of roses and Chio mastic. The latter drug, which is the product of the lentisk ("pistacia lentiscus") was held in the greatest esteem in the middle ages and down to the 17th century, Chio being long regarded as the only region in the world capable of affording it. It is still used in the East as a masticatory, and it would appear possible that out of this use "Rahat loukoums" developed.

The industry was introduced into Syra from that island over half a century ago by one of the numerous fugitives from the massacre of Chio in 1822, who found refuge and established themselves in the Cyclades.

The article has since gradually been perfected, stripped of its Eastern peculiarity, and made more suitable to European taste.

ISLANDS OF THE CYCLADES.

Milo.

Argentiferous
barytes.

The exploitation of the argentiferous barytes, concerning which a report was issued in September last,* has not been taken in hand yet, though tenders were invited by the Greek Government for the purchase of 150,000 tons of the mineral since May, 1893. This failure may be attributed to the unacceptable and complicated nature of the conditions laid down by the Government. It is, however, rumoured that the French Company of the mines of Laurium, which in Greece is considered the principal centre of mineral industry, will probably undertake the working of the silver ores of Milo. In this case the Government will, no doubt, have to modify the present terms of the agreement in order to facilitate matters.

There was a considerable decrease in the output of the different mines during the year 1893, owing to the unsettled financial

* "Mineral Resources of the Island of Milo," Miscellaneous Series No. 308.

condition of the country, and the total exclusion of American markets.

Only 5,025 tons of manganese ore were exported, 1,800 tons Manganese being sent to France, 1,700 tons to Great Britain, and 1,525 tons ore. to the Laurium smelteries.

Sulphur was not in high demand either, about 350 tons being Sulphur. sent to France and the Peloponnesus.

About 2,686 quintals* of gypsum, valued at 13,430 dr., were Gypsum. sent to several Greek ports; and millstones, valued in all at Millstones. 59,716 dr., were exported to Italy, Cyprus, Crete, and some Greek ports. The output of millstones was most satisfactory last year, a considerable increase over previous years being noticeable.

On August 13, 1892, a fixed green light, elevated 134 feet, New range 4 miles, was exhibited from Bombarda Point, on the lighthouse. northern side of port Milo.

Naxos.

During the year 1893 the shipments of emery-stone amounted Emery-stone. to 3,207 tons, of which 2,507 tons were exported direct from Naxos to the following ports:—Hamburg, 877 tons; Rotterdam, 453 tons; Havre. 1,177 tons; the remaining 700 tons were shipped, via Syra, for England and America.

The exploitation of this mineral has been open for concession since 1891, and sales are now made by the Greek Government direct to buyers applying for same at the price of 2*l.* 12*s.* per ton, delivered on shore at Naxos, or through the Société des Monopoles de Grèce, of Athens, to whom the Government is also consigning quantities of the mineral for sale.

The crop of citrons was very limited last year, amounting to Citrons in about 200 tons, of which none were exported. The prices paid by dealers was 13*s.* 6*d.* per cwt., c.i.f., which price could not be obtained in the English and other markets. The depression attributed to a general stagnation of this particular trade Europe, especially at Leghorn, hitherto reputed the centre of the trade in candied citrons.

According to a recent report from the Greek Consul of that port the trade in citrons, which were largely obtained from Sicily, Corsica, Naxos, and Corfu, and afterwards exported as candied fruit, or in brine to Germany, Great Britain, Holland, but more extensively to America, has completely dwindled down during the past year, owing to the heavy dues imposed in America on this commodity. As a matter of fact, the numerous factories of Leghorn have ceased their demands altogether, and only a small quantity of the best Corsican and Sicilian produce is actually disposed of at 9*s.* and 10*s.* per cwt., prices being only nominal.

Santorin.

The exportation of this volcanic production, of which thick Pozzolana (cement).

* 1 quintal = 44 okes, or 123·2 lbs.

(1739)

B

layers occur in this island and the adjacent isles of Therasia and Aspronisi, has of late been less considerable than formerly. From pozzolana, which resembles Portland cement, an excellent kind of mortar is made which hardens under water, and is much used in hydraulic works, chiefly in the construction of moles and bridges.

About 30,000 tons were, up to 1890, annually extracted and sold at 10 dr. to 12 dr. per ton, a duty of $2\frac{1}{4}$ dr. per ton being retained by the Government. The quantity extracted and prices charged are actually much less, owing to the general depression of trade in Greece.

During 1893 only 7,000 tons were extracted, of which 3,000 tons were sent to Austria, 1,500 tons to Turkey, and 2,500 tons to Greece. In 1890 and 1891 the exportation of this material to Austria was double the amount, and in 1889 treble.

Wines.

The average production of the vintage of Santorin amounts to 50,000 hectolitres.* During the year 1893 10,000 hectolitres were exported to Russia, 5,700 hectolitres to Malta, 2,000 hectolitres to Egypt, 2,000 hectolitres to Turkey, 1,000 hectolitres to Germany, and about 30,000 hectolitres to various Greek ports.

Two kinds of wines are manufactured in this island; the red and white common wines, and the sweet wine called vino santo. The red wine is again of two kinds: the so-called Bordeaux, in imitation of the French production, and the ordinary wine.

Besides the ordinary white another special wine, extra white, is made, which was formerly exported to England.

Ordinary wines are sold at 12 fr. to 15 fr. the hectolitre, and the sweet wines at 30 fr. to 35 fr.

The greater portion of the sweet wine is exported to Russia, where it is mostly used for ecclesiastical purposes.

A fall in the prices is expected owing to the market of Malta having become glutted.

New
lighthouse.

On February 13, 1893, a fixed red light, visible from N. 24° W. (leading over the centre of Anchorage bank) through E. and S., to S. 67° W., between (approximatively) N. 74° E. and S. 72° E., the light may at times appear flashing, caused by the sails of a windmill (when working) situated about 21 yards westward of the lighthouse, and through about 6° of this sector it is partially obscured by the mill, when within about $3\frac{1}{2}$ miles from the light; elevated 378 feet, range 8 miles, was exhibited in $36^{\circ} 27\frac{1}{2}'$ N., $25^{\circ} 23'$ E., at Epanomeria, about 240 yards within Cape Amuthi, west coast of the Island.

Paros.

Marble
quarries.

The quarries of which mention was made in our last report are still left unworked, and, it is supposed, afford an opening for some business.

The Parian marble so celebrated in times of yore is pure, white, and fine-grained, and its beauty is eminent. The ancients called

* 1 hectolitre = $26\frac{1}{2}$ gallons.

FROM CHART N^o 2836.
SHOWING CORRECTION IN RED.



it lychnite (λυχνίτης). It occurs in a regular layer of great extension and of a thickness varying from 1 to 4 metres. The quarries are situated on Mount Marpisse.

Seriphos.

Owing to the quarantine restrictions to which vessels were subjected in Greece, as well as the crisis in America, to which country no mineral was exported during the year 1893, the exportation of iron ore was considerably lower than that of the preceding year.

Only 67,670 tons of ore valued at 16,240*l.* were exported, 15,900 tons being sent to Glasgow, 2,700 tons to Birkenhead, 2,950 tons to Middlesbro, 20,770 tons to Dunkirk, and 25,350 tons to Rotterdam.

In the preceding year 39,110 tons were alone exported to Philadelphia.

The number of steamers which entered and cleared the port of Seriphos laden with the above mineral was as follows :—

Nationality.	Number of Vessels.	Tonnage.	Quantity Shipped.	Total Value of Mineral.
			Tons.	£
British	18	25 836	52,260	..
Dutch	3	5,318	12,050	..
Greek	1	1,500	3,260	..
Total	22	32,654	67,670	16,240
„ 1892	57	69,590	142,400	37,035

Zea, Thermia, and Nio.

These islands have now been placed in their correct positions Zea and on the Admiralty charts. The maximum amount of alteration is, Thermia, in the case of Zea $\frac{3}{4}$ mile, and of Thermia $1\frac{1}{2}$ miles. (See subjoined plan.)

Point St. Nikalo, at Zea, in $37^{\circ} 40' N.$, $24^{\circ} 19\frac{1}{4}' E.$, has been Zea. altered to a fixed red light, visible from N. $68^{\circ} E.$, through E. and S. to S. $44^{\circ} W.$, elevated 120 feet, range 10 miles; a weak red light is visible within port St. Nikalo.

Also Point St. Nikalo old light has been transferred to Cape Tamelos, southern point of island, in $37^{\circ} 31\frac{1}{4}' N.$, $24^{\circ} 17' E.$, and exhibiting a fixed and flashing white light, with a period of 2 minutes. Weak fixed white light 90 seconds, eclipse $10\frac{1}{2}$ seconds; flashing white 9 seconds, eclipse $10\frac{1}{2}$ seconds; visible from N. $89^{\circ} W.$, through N. and E. to S. $17^{\circ} E.$, elevated 200 feet, range 16 miles.

The light exhibited in $36^{\circ} 43' N.$, $25^{\circ} 16\frac{1}{4}' E.$, on Cape Nio. Fanari, at Nio, on western coast of island, has been altered from fixed red to fixed white.

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G R E E C E.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE PIRÆUS.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1184.

*Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.*

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G R E E C E .

PIRÆUS.

Captain James Boyle to the Earl of Kimberley.

My Lord,

Piræus, March 20, 1894.

I HAVE the honour to forward your Lordship my Annual Commercial Report, with Annexes, for year ending 1893.

I have, &c.

(Signed) JAMES BOYLE.

Report on the Trade and Commerce of the Piræus for the Year 1893.

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During the year 1893 the Corinth Canal was opened by the King and Queen of Greece accompanied by officers of State, civil functionaries, and members of the various diplomatic corps. This national event took place in August, and on November 9 it was opened for traffic. The work was originally commenced on April 10, 1882.

The first company failed in constructing it in July, 1889, and the work was commenced again by a Greek Company in June, 1890.

The total cost of the Canal was 70,000,000 fr. gold.

Cost of Canal.

Up to the commencement of February, 1894, 267 sailing vessels had passed through it, amounting in tonnage to 10,488 tons; steamers to the number of 71 also passed through, amounting in tonnage to 10,983 tons. Some war vessels of different nationalities have also passed through. The biggest steamer was the German steamship "Sophie," of 1,070 tons register, drawing 14 feet.

Number of
vessels
passing
through Canal.

The currents, I am told, have not up to now been sufficiently studied, but various trials are being commenced, but there is a current which runs $2\frac{1}{4}$ miles, with a strong wind from north-west. This also appears to be the prevailing wind.

Current.

I attach the provisional regulations for passing through the Canal, and which are as follows:—

Provisional
regulations
for navigation
for 1893-94.

Provisional Regulations for Navigation for the Year 1893.

Art. 1. Captains of ships shall conform themselves to the present regulations, they shall obey all signals therein mentioned and satisfy any requisition made in view of the execution of these regulations. A copy of the regulations will be delivered to them on demand.

Art. 2. The transit through the Corinth Canal is open to ships of all nationalities, provided that their draught of water does not exceed 7 metres and 20 centimetres, and their width does not exceed 20 metres.

Sailing vessels above 20 tons are bound to be towed through.

Steam vessels may pass through the Canal by means of their own steam power or be towed.

Of course the towage of steamers through the Canal is not compulsory on the Society, it will be only performed in so far as they have unengaged tugboats.

Art. 3. The ships must have a speed as reduced as possible without hindering the action of the helm.

Art. 4. The captain of every ship intending to proceed through the Canal must pay at the entrance of the Canal all dues for passage, and when there is occasion, for towage and pilotage, and give the following written information:—

Designation of the ship.

Name and nationality of the ship.

Name of the captain.

(1717)

A 3

Names and addresses of the owners.

Port of sailing.

Port of destination.

Draft of water.

Number of passengers ascertained by the passage list.

Statement of crew.

Tonnage and nature of the cargo.

Net tonnage ascertained by the ships' official papers and established in conformity with the Rules of the International Tonnage Commission, assembled at Constantinople in 1873.

Art. 5. The Society determines the hour of departure and the stoppages of each ship. No ship can enter the Canal unless she has received authorisation from the captain of the port.

In the daytime a blue flag, at night a white light, hoisted on the signal mast, signifies that the passage is clear.

A red flag or a double white light signifies that the passage is not clear.

Art. 6. All ships ready to enter the Canal must have their yards braced forward, and their boats swinging in board. In addition to their two bow anchors they must carry at the stern ready for letting go a strong kedge with a stout hawser bent on sufficient to hold the ship.

Art. 7. Navigation by night time is authorised. All ships must carry lighting apparatus.

Art. 8. In the event of a grounding, the agents of the Society shall have the right to direct all operations by which a vessel is to be floated off again, to unload and tow the vessel as may be necessary at the expense of the vessel.

The aforesaid costs of floating, towing, discharging and re-loading must be paid before the departure of the ship.

Art. 9. The following prohibitions are hereby notified :—

1. The anchoring of a ship in the Canal except through unavoidable circumstances.

2. Throwing overboard in the Canal cinders, ashes, or material of any kind.

3. To allow any guns to be fired from on board their ships.

Art. 10. The net tonnage resulting from the system of measurement laid down by the International Commission of Constantinople and inscribed on the ship's official papers is the basis for levying the navigation due which is at present :—

For steamers sailing to or from the Adriatic—

Seventy-five (75) centimes per ton for postal steamers and those that carry habitually passengers.

And fifty (50) centimes per ton for the other ships.

And for steamers not sailing to or from the Adriatic :—

Fifty (50) centimes per ton for postal steamers and those that carry habitually passengers, and forty (40) centimes per ton for all other ships.

A charge of one franc (1 fr.) per passenger will also be levied.

Art. 11. Are excepted from paying these transit dues :—

1. The Hellenic war ships, except vessels assimilated to them by special conventions.

2. Fishing and other boats, under Hellenic flag, whose tonnage does not exceed 3 tons.

Art. 12. The charges for towage in the Canal by the Society tug service is fixed at ten (10) centimes per ton.

The minimum charge to be fifty (50) francs.

The charges for pilotage is fixed at one and a-half ($1\frac{1}{2}$) centimes per ton. The minimum charge to be ten (10) francs.

Art. 13. All ships towed must furnish their own warps.

The steamers must use their propelling power or keep it in readiness for assisting the tug.

Ships can be towed by tugs not belonging to the Canal Society.

Such tugs will be submitted to payment of the navigation dues to which ships in transit are subject.

Whenever they go through the Canal for the purpose of meeting vessels of their owner which they intend towing, or when returning to their usual berth after having towed them through, the said tugs shall not be submitted to payment of the dues.

Art. 14. The Society accepts in payment drafts at sight drawn by the captains on the owners accepted by the Society.

Payment in cash at the entry of the Canal must be in gold coins of the type of coins of the Latin Union, or in sterling pounds at the fixed change of 25·15 fr., or in coins of 20 marcs at the fixed change of 24·85 fr.

Or in Turkish pounds at the fixed change of 22·75 fr.

Or in Egyptian pounds at the fixed change of 25·75 fr.

Silver coins having legal course in Greece are accepted in payment as odd money up to 10 fr.

The electric light at first failed, but is being renewed, and Lighting.
vessels can travel through at night with their own lights, and also if a good clear moon is shining.

The depth is 8 metres (26 feet). The width at bottom is Dimensions.
21 metres (67 feet). The width at sea surface is 24 metres (80 feet). The total length is 6,300 metres ($4\frac{1}{2}$ miles).

The general opinion is that the charges laid down in Art. 10 Remarks.
of Provisional Regulations are too high, but I am told that these may be reduced, but not at present. I consider this a rather short sighted policy, as I have heard from various sources that more steamers would use the Canal if this was done. Whether the Canal will ever pay remains to be seen, but most people who can speak with authority regarding it say it will not. It is beyond any doubt a great engineering feat, and is deserving of success in every way.

This Bill for the protection of industrial and trade marks in Greek Trade
Greece has now come into operation. Her Britannic Majesty's Mark Law.
Minister at Athens enclosed a translation of the Bill to the Foreign Office, dated January 16, 1893, but since this a Royal Decree has sanctioned the Bill, and it has become law. The
(1717)

translation of the Royal Decree has also been sent to the Foreign Office, and it appears in a short form in the official copy of the "Board of Trade Journal" for February, 1894; and the translation of the Bill is also in the official copy of the "Board of Trade Journal" for February, 1893, page 154.

There is no doubt but that this Bill was very much needed, as there were frequent frauds of trade marks and infringement of existing regulations: but now this Bill is passed and has become law, parties registering their trade marks will have full protection, as long as they abide by the rules laid down.

I think it advisable to mention what is necessary for anyone wishing to register their trade mark in Greece; in the first instance:—

Necessary
regulations.

1. They must send out here three copies of their trade marks with plate to their representative.

2. A copy of registered trade mark in England, which must be legalised by the Greek Consul, wherever there is one.

3. A special power of attorney, and to save trouble and expense, this power to be made out in the Greek language and preferably at a Greek Consulate.

Documents
where to be
placed.
Payment of
fees.

Other
expenses.

All the above documents will be placed in the Court of the First Instance at Athens.

60 fr. in gold, not paper, and 2 fr. in gold is to be deposited in the Treasury at Athens on application for registration.

10 fr. to 12 fr. in gold will cover all other expenses, so I am told, such as stamps on legal paper, &c., fees to clerks, but whether this can be said to be correct I am unable to say, as every official clerk in the Greek Courts appears to claim something.

Appointment
of repre-
sentative.

It will be necessary for anyone wishing to register his or their trade mark to appoint someone as their legal representative in Piræus or Athens, to carry out the various regulations, and on application to me, I shall be most happy to give the name of some trustworthy person who can perform all the necessary duties.

Revenue
returns.

The revenue returns for the 11 months ending November 30, 1893, have just been published. The receipts show a falling off of 1,512,240 dr., as compared with the same period of the previous year, notwithstanding increased taxation. The duties on imports show a falling off of 3,842,639 dr., but the tax on tobacco shows an increase of 1,500,000 dr. Direct taxes show an increase of 600,000 dr., probably due to the improved methods of collection.

Trade
generally

In my last report on general trade I reported that it was on the whole satisfactory, but since then it has certainly not continued to improve, but has fallen off. This is no doubt due to the exchange which has been most fluctuating. No one is doing a good business, in fact far from it, nor do people see sufficient prospect of an early improvement to warrant them in entering on new enterprises involving large outlays of capital. Lack of confidence goes with lack of enterprise, and the result is commercial and financial paralysis.

I have again to remark that I am unable to give an exact and accurate table of exports and imports on account of no statistics being ready for issue by the custom authorities; but in Annexes Nos. 1 and 2 attached to this report, I should wish to point out that in the imports to Greece, whilst serious reductions have taken place in every country between the returns of 1891 and 1892, one only, and that one Germany, maintains its position; and in the exports from Greece, Germany, Italy, and America are the only countries that show an advance.

In Annexes Nos. 3 and 4 showing the imports and exports divided by customs-houses, the fall of Syra is much more evident than in any previous report. The difference in imports in the Syra custom-house between 1891 and 1892 is nearly half. Why the large Liverpool line of steamers continues to call at Syra instead of at Piræus, especially now that the Corinth Canal is open, is difficult to understand. The fall of Syra as a port, and advance of Piræus, is further accentuated by Annex No. 5.

The hoped for improvement of communication between Athens and Piræus, referred to in the last commercial report, has, I am very sorry to say, not yet taken place. The new line and tunnels were ready to be taken over on the fixed date, January 13, 1893, but up to the present time, owing to the disputes between contractors and company, have not been taken over. It is also difficult to understand why trains are not run oftener between Piræus and Athens, and quicker, as the double line appears to be in perfect working order. Its 200 dr. shares are to-day quoted at 176, which is a falling off from last year, although the passenger traffic has increased.

During the past year the works on this line have been retarded owing to an arbitration which has been proceeding between the Greek Government and the English Company, Messrs. Eckersley, Godfrey, and Liddelow, of London. The award of the arbitrator gives to the Government reimbursements from the company to the amount of about 108,500*l.*, and extends by 3 years the period allowed to the company to complete the undertaking. This is accepted by the Government as satisfactory, but it has, on the other hand, been denounced by some of the Opposition journals. The company are still pushing on the various works, the heaviest of which is in the Bralo Tunnel, and which I am told, under ordinary circumstances, would have kept the whole enterprise waiting.

This has been practically a dead letter during 1893 owing to quarantine regulations, but now it is in operation again and is working more or less satisfactorily, although serious delays still occur, and it appears to be an impossibility to discover why parcels, &c., take so long in arriving.

To meet the depreciation in the currency owing to advance in exchange, the postage for postal union letters is still 30 *l.* paper money for a postage stamp with 25 *l.* face value. The alteration mentioned in my last report likely to be put in force regarding telegrams to foreign countries has been arranged as

follows:—A committee, consisting of Director of Post Office at Athens and two other officials nominated by the Government, fixes the rate of exchange at which foreign telegrams can be accepted at the end of each 3 months. The present rate is 166 dr. per 100 fr., and this remains in force till the end of April, 1894, when the exchange will again be considered. Telegrams can, however, always be paid for in gold.

Mail service
to and from
England.

It is the universal complaint of one and all that a more frequent mail service is not established; and also that it is not better regulated. At the present time the mails for London on Tue-days, via Patras, in each week departs in the morning from Athens at mid-day, and the mail from London arrives in evening of the same day. It can be well understood, I think, what inconvenience this causes to all business men and others. There are other mails for London leaving Piræus on Wednesdays and Fridays in each week, but these proceed by sea round Cape Matapan and thence to Brindisi, taking 6 or 7 days and even more before arriving in London, so that at the present moment Tuesday's mail to London is the only one by which letters, &c., can be delivered in England in $4\frac{1}{2}$ days.

Nickel
money.

Owing to the scarcity of silver and the depreciation of the currency, and to avoid the great quantity of copper coin in circulation, nickel pieces of the value of 20 l., equal to about 13d. in English currency, are now in circulation, and later 10 l. and 5 l. pieces will be in use. These are similar to the Swiss coins. They have been made by the same French manufacturer, Borrel, who was responsible for the copper ones.

Manufactory
for hats

On account of the high customs tariff the number of articles manufactured in Greece is extending. The most conspicuous example during the past year is the commencement of the manufacture of felt hats. I am told that the parties responsible for this venture sent delegates to Paris to buy machinery and learn the art, but were refused admission to the secrets of the trade. They then went over to England and were more fortunate at Stockport. They have returned with four English workmen, and are now fitting up the works in the outskirts of Athens. I may point out that English machinery is being fitted to this manufactory, and although I understand it is the intention of the company eventually to make hats from the very commencement, at present a certain amount of the raw material comes from England.

Reduction of
duty on dried
fruits

The proposed reduction of the duty on dried fruit imported into England from Greece has attracted great attention, and hopes are generally expressed on all sides that the suggestion will be acceded to. There is no doubt that the advantage to the currant trade would be of the utmost importance, as currants could be sent to England for distillery purposes. This reduction, if it takes place, is somewhat diminished by the reduction of the duty on Turkish raisins. The exportation also of figs to England would also become most profitable, and as the Greek fruit is cheaper than the Smyrna fig, it would most probably find a considerable market.

Owing to the high prices of coals during the last months of 1893 the stock at the Piræus was very limited, and great imports are being made to cover the demand. The strikes in the Midland and South Wales collieries from June to October have greatly affected the trade, while the quarantine regulations in Piræus have restrained the demand. During the strikes in England a quantity of Greek coal (lignite) was imported from Connuy and Oropos, and which was of very bad quality; about 127,277 tons of coals entered the Port of Piræus in 1893, and the following are the approximate prices:—

Month.	Per Ton.	
	From—	To—
	Drachmas.*	Drachmas.*
January	33	34
February.. .. .	32	33
March	32	33
April	32	33
May	32	33
June	32	33
July	36	37
August	38	40
September	42	45
October	42	45
November	45	48
December	44	46

* Average value of drachma during the year 1893 about 6d.

The exchange has during the year 1893 undergone violent fluctuations, and in consequence all business has received a serious check, and great difficulty has arisen with regard to all payments; and naturally one and all postpone payments in the hope of exchange falling.

Month.	Lowest.	Highest.
	Dr. l.	Dr. l.
January	38 50	40 10
February.. .. .	36 50	39 65
March	34 70	37 80
April	34 20	37 30
May	35 80	45 80
June	38 50	41 40
July	39 20	42 80
August	41 00	42 65
September	42 45	47 00
October	43 30	46 40
November	38 70	44 20
December	38 95	43 05

On May 9, 1893, it was 37 dr. 60 l., and on May 10 it was 41 dr., which is a rise of 3 dr. 40 l. in 24 hours, and it gradually rose till May 25 when it touched 45 dr. 80 l. The highest point was during September when it reached 47 dr. Bad as it was in 1892, it will be seen how disastrous it is in 1893, and of course it has caused proportionately a more serious damage to trade.

Convention
steamers.
Postal
convention.

Several enquiries having been made by parties asking as to what steamship companies had a postal convention with the Greek Government, I attach a list of such companies. They are as follows:—Austrian Lloyd, Florio and Rubattino, Messageries Maritimes, Fraissinet Company, Russian Steamship Company, Jehederich Line, Dutch Steamship Company, United Steamship Company, of Copenhagen, Messrs. William Johnston and Co., Liverpool, Messrs. Wescott and Laurance, London, Eyre Steamship Company, Cunard Steamship Company, Messrs. F. Leyland and Co., Messrs. Papaganni and Co., the Anglo-Hellenic Steamship Company (Messrs. Lambrough), Princes Line, Deutsche Levante Line.

Widening of
the Euripos
Channel at
Chalcis.

There is now every probability that this most important work will be finished during 1894. The blasting and excavation of the channel will be finished, I am told, by the middle of May, and the iron bridge, which is to go across, is expected from Belgium in September or October, 1894. As was expected, although the speed of the current now that the channel is wider remains the same, the quantity of water passing through is considerably increased. The contractor of the works states that six times more water passes through the channel than formerly, when finished there will be a minimum depth of 8 metres (1 metre equals 1 yard 4 inches) and a minimum width of 4 metres.

Lighthouses.

In my report for 1892 I drew attention to some new lights which were being placed in the *Ægean* Sea. I was given to understand at that time that these new lights would be placed in position in 1893, but I find out that this is not correct. The lighthouses which I refer to are the one on Cape Lythari, on the Island of Steyro, that on the Island of Psathoura, that on Island Prasouda, and that on Cape Tamalos south point of Zea. The masonry buildings of all these lighthouses are finished, the machinery has arrived, but owing to lack of funds the works are at a stand still. It is a pity that such is the state of affairs, as these important works ought not to be delayed, and captains of vessels continually complain.

Lighthouses,
Corinth
Canal.

The special lighthouses for lighting the Corinth Canal, namely, those of Psaromita, opposite Vostizza, Malangari, opposite Corinth, Soussaki, near Eleusis, are also being built.

The following is a nearly correct list of lights and lighthouses which have been begun during the year 1893:—

Island of
Santorin.

On the north-west side of island, on the place called Epanomeria, a lighthouse is being erected, which commenced operations on February 13, 1893. The apparatus is dioptric, of the 5th class, with a fixed red light, visible at a distance of $8\frac{1}{2}$ miles during fairly clear weather. The angle illuminated is

271°, *i.e.*, from south 61° west to north 30° west. This light may sometimes appear flashing, which is caused by the sails of a windmill on land.

On this cape there has been erected a lighthouse for harbour, which was commenced on March 15, 1893. The light is hoisted on a metal column fixed in an iron cabin. Light is red and visible at a distance of 5 miles during clear weather. Light is 23 feet above level of the sea.

Cape Aratelo.
Gulf of
Arta.

In this gulf, on the point south-east of the Astros Acropolis, a lighthouse is being built. This work was commenced on May 1, 1893. Apparatus is dioptric, with fixed red light, and visible 5 miles in clear weather. Light is 76 feet above the sea level.

Gulf of
Nauplia.

This light was commenced on June 28, 1893. It is placed on an iron column. It is a fixed red light, visible at 5 miles, and stands 27 feet above the sea-level.

Harbour of
Aigaios.
Gulf of
Corinth.

Fixed red light, erected June 28, 1893, is visible at 5 miles, illuminating an angle of 270° from west to east. This tower and house stands 82 feet above sea-level.

Island of St.
Eus'ache.

Fixed white light, flashing every two minutes, placed on the north point of the entrance to Port St. Nicholas, has been replaced by a fixed red light. It is dioptric, of the 4th class, and is visible 10 miles in fair clear weather. It stands 120 feet above sea-level.

Port of St.
Nicholas.
Island of
Zea.

No mention has ever been made in any previous report of the Sailors' Institute at Piræus. It was started nearly two years ago entirely by private contributions, and the good that it has done and is doing cannot be over-estimated. At the present time most of the English newspapers can be seen by sailors and others, and it has proved the greatest boon to them in all ways, so much so that larger quarters are required. It keeps men from the vile drinking shops, &c., where they are robbed and drugged. Last year over 2,700 men, sailors and others, visited the institute to read the papers, write letters, and play dominoes and draughts. Coffee only can be had on payment. I would most earnestly call the attention of this Home to shipowners, steamship companies, and others who visit the port of Piræus, and ask one and all to send subscriptions to me, so as to provide better accommodation, &c. The smallest contributions in money and books is asked for towards this good work.

Piræus
Sailors'
Institute.

This shoal still exists, and, as far as I can understand, nothing has been done towards removing it. Why this is I cannot imagine, but such is the case. I do not think that the work required for removing it would be costly, and the benefit to shipping, &c., would be enormous. A great and serious complaint of captains of vessels is the length of cable that various ships are allowed to run out to their anchors, in some instances lying right in the fair-way of channel, and seriously interfering with vessels leaving the harbour. Quite lately an English steamer leaving her moorings fouled an anchor, and seriously damaged her propeller, breaking off two of the blades of her screw.

Shoal in Port
of Piræus.

On account of the high rate of the exchange, and the im-

Importation
of cattle.

portation of cattle from Thessaly, there has been a marked decrease in the cattle trade from Russian ports. Formerly, one may say, all cattle came from Odessa and other ports in Russia.

The following is an approximate list of cattle, &c., landed:—

Articles.					Number.		Value.
Oxen	..	..	..	..	1,260	Per head (about)	14 <i>l.</i> or 15 <i>l.</i>
Cows	..	..	..	..	1,289		
Sheep	..	..	..	..	13,578		

Grain crops,
&c.

The harvest in 1893 was considered the best that has been for the last 10 years, both in abundance and quality, but it does not appear to have lessened the prices, which are as follows:—

Articles.							Per Oke.
							Leptas
Wheat	..	..	..	..	..	..	37
Oats..	..	..	..	..	..	..	22
Barley	..	..	..	..	..	..	22
Maize	..	..	..	..	..	..	22

NOTE.—1 oke = about 2½ lbs. These prices are all in paper currency.

Provisions.

Provisions are good, and are much the same in price as in 1892. The prices are about as follows:—

Articles.					Per Oke.	
					From—	To—
					Dr. l.	Dr. l.
Mutton	..	..	..	..	2 30	2 0
Pork	..	..	..	..	2 20	2 30
Beef..	..	..	..	..	2 50	2 70
Bread—						
1st quality	..	..	..	..	..	0 55
2nd "	..	..	..	..	..	0 50

General
remarks

Notwithstanding what I reported last year, warning persons against giving open credits indiscriminately, it appears that the same process is still being carried on, and I would again most earnestly call the attention of all as to what I then said. During the year 1893 amounts varying from 100*l.* and 500*l.*, and making a total of 2,000*l.*, have been sought to be recovered. These amounts are for dishonoured bills, protested bills, bad debts, and it is almost an impossibility to collect these debts. I again

repeat, that with ordinary caution, and taking the advice which I gave last year, these debts would never occur, and great expenses would be saved to all parties.

In my commercial report for 1892, and in my remarks on Greek finances, I mentioned that it was expected that a new loan would be negotiated on reasonably favourable terms, and in order to relieve and lighten the pressure that was then existing the Government proposed to withdraw by degrees the superfluous paper currency, amounting to 74,000,000 dr., or thereabouts. By this arrangement it was hoped that the exchange would have fallen to par or almost to par. The whole scheme, however, collapsed with the failure of negotiations for a loan, as the London financiers sent an ultimatum requiring the signature of the Convention within eight days, which was impossible for many reasons. A joint meeting of the German, French, and English Committees has been held in Paris to consider what is best to be done under the circumstances, and most of the journals here contain articles on the protest of the united bondholders. The journals in opposition to the Government appear to say that the language of the protest savours of foreign control over the entire finances of Greece, as far as the External Debt is concerned, and they bitterly reproach the Government.

A Bill has been introduced to the Chamber to relieve distress in the currant districts, with the following measures:—Arrangements to be made with a monopoly company for creation of a special bank, with a capital of 9,000,000 dr., which will make advances to growers at rate of interest at not more than 8 per cent., and will undertake to purchase a certain proportion of unsold stock of currants for distillery and other purposes. This Bill, however, is being opposed in a very strong manner by the Opposition, and, as far as I can gather, there is small chance of the Bill becoming law.

LAURIUM.

Notes on the Mineral Industry and Trade of the Laurium District during 1893.

On first glancing at the shipping return attached to this report a remarkable decline will be observed in tonnage for imports and exports during 1893. Quarantine restrictions in Greece from almost all European ports have seriously checked trade, and large stocks of ore in consequence have been shut up here, remaining unsold. Fortunately a great many ports had been left free of quarantine, and it is expected that the movement in shipping will again resume its usual activity, and although several owners of mines have reduced the output of manganese iron ore about 60,000 tons, which amount was left over from 1892 will, it is hoped, raise the prospect of export for 1894.

Imports from
United
Kingdom.

During 1893 British bottoms amounted to 71,844*l.*, foreign bottoms to 27,281*l.*, and German bottoms to 11,641*l.*, amounting in all to 110,766*l.*

The direct import in British shipping was this year reduced to 28 vessels, 29,808 tons, which carried fuel, machinery, and sundry goods, amounting in value to 71,844*l.*, against 31 vessels, 32,870 tons, with a value of 74,308*l.*, or a difference of 3 vessels, 3,062 tons, value 2,464*l.* less than in 1892. The whole imports from the United Kingdom in British and foreign bottoms amounted to 99,125*l.*, against 88,857*l.* in 1892. The share of foreign tonnage was 27,281*l.* on the above imports, whilst imported goods in foreign bottoms amounted only to 14,539*l.* in 1892. The strike in the Welsh collieries, &c., during 1893 somewhat influenced the increase of imports from Germany, several cargoes of German coals having arrived to supply the pressing wants of the district.

Of course the above figures which I have quoted do not include the value of goods and merchandise in transit for Athens and Piræus by the Pan Hellenic Navigation Company from France, England, and Austria. This amount cannot be estimated, as the customs statistics at this port afford no means of obtaining such information. It may, however, be presumed that such values must be rather high, as the customary dues levied thereon have reached the sum of 906,654 dr., of which amount 1,085 tons of sugar imported claims the larger share.

Merchants residing at Athens and at Piræus have found that it pays them better to undergo the railway charges for their goods, thus avoiding the wharfage dues to which all kinds of merchandise is submitted there, and the margin left in their favour by this mode of transit appears to be an important item, but the profit is only reaped by them, as the rates in the market are kept on the same level as if wharfage had been really paid. To stop the losses in general trade the Laurium Town Council was called upon by the Government to impose wharfage dues on all imports at this port, but this was most strongly opposed, as it would prove most disastrous to the mineral industry, as it imports a large quantity of fuel, material, &c. A similar tax refers to shipping freights, which would do great harm to the exports of manganese iron ore, competing with shipment of Spanish ores, and this business would be most seriously hindered in consequence.

Direct export
trade.

Direct export trade in British bottoms for 1892, although lower in tonnage owing to reasons referred to at head of this report, show an increase in value. More valuable cargo has been exported than in 1892. Fifty-two vessels of 62,770 tons had cleared with cargoes consisting of 11,873 tons of silver lead (average contents of silver from 1,500 grains to 2,000 grains per ton of lead), 3,545 tons of roasted zinc ore, and 88,175 ton of manganese iron ore, of a value of 252,227*l.*, or an increase of 41,312*l.* above that of 1892, whilst there is a decrease of 9

vessels, amounting to 6,654 tons in comparison with the year 1892.

The exact amount of exports to the United Kingdom was 275,131*l.*, of which amount 22,904*l.* were carried in foreign bottoms.

The total value of all ores and lead exported during the year 1893 was 432,286*l.*, against 439,128*l.* in 1892, which was shared as follows :—

Exports to—				Vessels.	Amount.	
					£	£
England	..	..	..	Direct trade	252,227	275,131
"	..	..	..	Foreign bottoms	22,904	
Belgium	..	..	..	British	61,898	131,115
"	..	..	..	Foreign	69,217	
France	..	..	..	British	11,640	13,440
"	..	..	..	Foreign	1,800	
Holland	..	..	..	British	..	9,225
United States	..	..	..	"	..	3,375
Total	..	..	..	..	..	432,286

Coasting trade imports in live stock, &c., for which I am unable to estimate on any official basis, might be calculated for as far as the local entry tax was levied to about 3,600,000 dr. Coasting trade.

Foreign shipping has shared in imports and exports with 14 steamers, 18,324 tons, entered, and with quite as many cleared, viz. :— Foreign shipping.

Nationality.	Number of Vessels.	Tons.	Imports.	Exports.
			£	£
Norwegian	8	10,475	27,232	80,153
German	2	2,708	5,671	3,523
French	2	3,288	8,024	8,545
Swedish	1	977	(Ballast)	1,800
Greek	1	881	250	(Ballast)
Total	..	18,324	41,177	94,021

The unsatisfactory state and tone of the metal markets in Europe became of late very low, and the output of zinc ore in several mines had to be stopped, the produce of this ore having been limited to the lowest figure hitherto known. Lead and manganese iron ore are leaving scarcely a margin for trade, and the Greek Laurium Company has granted no dividend to its Mineral industry.

shareholders. If no improvement takes place in this industry, and the decline in prices continues as in 1892, there is every probability of a further shutting up and closing of various mines.

The following is a list of the mercantile ores and lead produced during the year:—

Description.					Quantity.
					Tons.
Silver lead (pig) ..	..	..	..	..	15,469*
Calcinated zinc ore ..	..	..	..	..	23,055
Manganese iron ore ..	..	..	..	..	178,098
Lead ore and galène ..	..	..	..	..	8,900
Lead smokes ..	..	..	..	..	1,898
Blend of zinc lead ..	..	..	..	..	2,032
Speiss ..	..	..	..	..	1,230

* Silver contents from 1,500 grains to 2,022 grains to the ton.

Out of this produce the following are the stocks remaining unsold at the end of 1893:—

Description.					Quantity.
					Tons.
Silver lead (pigs) ..	..	..	..	..	366
Zinc ore ..	..	..	..	..	4,558
Manganese iron ore ..	..	..	..	..	51,493
Lead ore and galène ..	..	..	..	..	4,202
Lead smokes ..	..	..	..	..	..
Blend of zinc lead ..	..	..	..	..	323
Speiss ..	..	..	..	..	1,230

Manganese
iron ore.

It may interest buyers in the west of England to know that new discoveries of large lodes of manganese iron ore are rendering it very abundant, and the phosphorus quality of the ore seems to prevail, but pure ore is also easily obtained in many mines. Attention should also be called to the fact that the best of these ores is often slightly impregnated with arsenic, owing to their natural contact with carbonate of lead, which is quite as objectionable as phosphorus.

I attach herewith a summary table showing the lowest and highest average contents of this mineral ore, resulting from the repeated assays made by the several producers on the cargoes of manganese iron ore exported last year. It may be of some use and guidance to buyers who may wish to obtain some of the ore on trial. I am very much indebted to Vice-Consul Desposito for the above valuable report on mines, minerals, &c.

VOLO.

Report on the trade, &c., of Thessaly for the year 1893.

British Trade.

British trade. 23 British merchant vessels entered the port of Volo during the year 1893, of the aggregate tonnage of 26,045 tons, as against 19 vessels in 1892 of 21,256 tons, and 14 in 1891 of 16,228 tons.

These vessels brought coal, patent fuel, iron (wrought and unwrought), steel, chemicals, glassware, cloths, cotton, and woollen stuffs, manufactured goods and petroleum. The estimated value of these imports for the past 3 years is as follows, viz. :—

Year.						Value.
						£
In 1893	..	..	..	..	..	25,546
1892	..	..	..	..	..	38,173
1891	..	..	..	..	..	32,988

There has been an increase in the number of British merchant steamers touching at Volo in the past few years, chiefly owing to the fact that the vessels of the Johnstone line, which have traded regularly for a long time past between Liverpool and Piræus, now also touch here about once a month instead of transshipping their cargo for this port into Greek steamers at Piræus, as was formerly done. There can be no doubt, however, that a considerable quantity of British goods still comes here indirectly, being transhipped at Syra and Piræus.

The exports from Volo in British bottoms are very trifling, consisting annually of a few hundred tons of chrome ore, and country produce.

Foreign Trade.

Foreign
trade.

Steamships of the various Greek Companies arrive regularly daily from Piræus bringing transhipped goods from all parts of Europe. The vessels of the Austrian Lloyds Company touch at Volo every fortnight, coming from and going to Trieste and Constantinople. Ships under other flags than those mentioned seldom call here.

The unsettled state of the exchange has greatly militated against trade in all parts of Greece. During 1893 the rate has varied from 35 paper dr. (or fr.) to 45 paper dr. (or fr.) to the 1*l*. sterling, with sudden and violent fluctuations from day to day.

Annexed hereto is a table showing the amount of all the principal exports from Volo for each month of the past year.

Most of these exports go to other parts of Greece and Turkey. I have unfortunately been unable to obtain any detailed information regarding imports.

Agriculture.

The past year has yielded excellent crops throughout most parts of Thessaly. Considerable quantities of wheat and barley are grown in the province, and for the past two seasons there has been an ample surplus for export to other parts of Greece, &c. There is also considerable export trade in wheaten flour, semolina flour, chick-peas, buckwheat, sesame, olives, olive oil, tobacco, and country produce. Agriculture.

Great damage was done to some of the Thessalian crops in the spring of 1892 by swarms of field mice which suddenly appeared and overran many of the fertile districts. So serious was the damage to what would have otherwise proved an exceptionally good harvest that the Greek Government were induced to call in the services of Professor F. Loeffler to stay the threatened devastation. According to a résumé of his published account given in the "Journal of the Royal Microscopical Society," Professor Loeffler found that the Thessalian field mice differed in many respects from "*Arvicola arvalis*," the French Campagnol; it was larger, of a lighter colour, with large bright eyes and an unusually short tail. Its track marks were much more distinct than those of the German field mouse. Professor Loeffler's method of destroying the mice is by causing them to eat fodder soaked with cultivations of "*Bacillus typhi murium*," which bacillus is pathogenic only to field and house mice, all other animals being quite unaffected by it. For use in Thessaly the cultivations of the micro-organisms were made on a large scale; the medium used was oat or barley, straw decoction to which 1 per cent. pepton and $\frac{1}{2}$ per cent. grape sugar was added.

The plan adopted for administering the bacillus to the mice was to soak bread in the infected cultivation fluid and to place small pieces in the holes for the mice to eat, they then became infected with the mouse typhus and handed on the disease to each other.

Professor Loeffler claims to have effectually stayed the plague by the above means, and from what I can learn there seems to be no doubt entertained here of the efficacy of his method, although probably in some districts it may not have been applied with sufficient care and perseverance to ensure complete success. A few field mice still exist in some parts of the province, but now appear to cause no serious damage.

A factory is shortly to be established at Volo for the manufacture of sugar from beetroot grown in the neighbourhood. Specimens of the beetroot in question have been pronounced by French experts to be very rich in saccharine matter.

An agricultural bank which would make small loans to farmers

at a reasonable rate of interest is badly needed. At present, the business is mostly in the hands of private usurers. In consequence, after a bad season, large tracts of good land are often left unsown through the cultivators being unable to obtain assistance on fair terms.

There is much room for improvement in the quality of the various kinds of vegetable seed used in the market gardens. A school of agriculture, however, exists at Almiros which will doubtless effect progress.

Large portions of the best arable land in Thessaly are the property of people who reside permanently out of the country, who consequently do not care to introduce reforms which would probably prove unpopular with the peasantry. A few agricultural machines are, however, now regularly imported and are used with good results.

Railways.

Railways.

A steam tramway from Volo to the gulf villages of Agrea and Laconia has been arranged for by the Thessalian Railway Company. The necessary surveys having been already completed, the practical work of construction is expected to commence early this spring.

The existing railway from Volo to Larissa, Trikala, Kalabaka, &c., proves a great boon to travellers and growers in the interior who are enabled to forward the country produce cheaply and expeditiously to the coast.

Public Works.

Public works.

Preliminary operations are in progress for the construction of a much needed breakwater designed to shelter the harbour from the heavy seas caused by the frequent south winds. Much damage has been done in past years to lighters and small craft by these gales. It is hoped that the work will be completed in 4 or 5 years at an estimated cost of about 1,500,000 dr. I am told that a third of this sum has been already collected from the port dues and set aside for the purpose. The remaining 1,000,000 dr. it is trusted will be supplied from the same source during the progress of the work.

A short road has been made to the village of Ano Volo. The streets of this town have also been lately greatly improved and named.

Volo continues to grow steadily, many fine houses being annually built. It is intended to shortly introduce gas; the town is at present lighted by means of petroleum lamps.

Annex 1.—TABLE showing the Amount of all the Principal Exports from Volo for each Month of the Year 1893.

Exports.		January.	February.	March.	April.	May.	June.	July.	August.	September.	October.	November.	December.	Total.
Wheat	Tons	179	339	75	4	1	9	530	3,088	5,222	2,140	726	167	12,526
Flour	"	344	412	425	305	294	220	295	391	524	609	1,239	519	6,577
Semolina flour	"	28	100	41	54	78	3	10	...	309	285	187	99	1,095
Tobacco	"	23	23	61	47	93	48	6	60	52	126	168	74	807
Chick peas	"	17	26	1	13	2	...	...	40	29	102	54	5	237
Beans	"	...	21	2	...	2	...	...	21	23	43	71	22	230
Olives	"	9	33	4	...	36	2	6	4	6	...	14	3	63
Indian corn	"	16	50	7	...	4	119	228	44	...	...	14	2	51
Olive oil	"	117	162	2	31	18	34	68	88	69	50	37	26	792
Barley	"	1	1	2	...	...	7	...	...	...	...	...	...	14
Peas	"	1	16	2	...	...	...	...	...	...	...	...	...	3
Potatoes	"	24	...	6	...	...	...	...	...	...	...	...	...	8
Cottontail	"	3	...	...	...	...	...	...	...	...	...	...	...	170
Raw silk	"	...	...	...	...	...	...	...	...	...	...	...	...	3
Buckwheat	"	35	86	58	192	...	...	...	...	...	...	...	...	993
Bran	"	19	10	18	1	...	10	...	20	17	179	271	163	202
Cocoons	"	2	2	...	...	3	...	...	23	24	23	42	31	14
Cheese	"	14	6	1	1	...	...	...	26	13	10	20	14	90
Butter	"	3	...	3	...	2	2	8	27	13	50	58	12	24
Spirits	"	1	8	1	2	...	27	11	9	2	7	6	3	78
Rice	"	5	12	3	10	12	5	5	12	1	...	19	46	61
Seam	"	10	15	7	15	21	27	17	12	17	...	77	101	194
Coffee	"	...	1	...	1	2	21	...	...	...	...	...	...	348
Sugar	"	...	1	...	...	...	...	...	...	...	...	...	...	2
Sausages	"	3	...	...	...	...	...	2	...	...	...	...	...	9
...	"	...	...	...	...	...	...	2	2	10	11	3	4	35

PIRÆUS.

Annex 1.—RETURN of Imports into Greece from the under-
mentioned Countries during the Years 1889–92.

Countries.	Value in Gold Francs.			
	1889.	1890.	1891.	1892.
England	36,666,561	43,037,885	45,680,363	33,586,093
Russia	34,509,121	25,687,300	27,879,644	13,542,221
Turkey	30,553,228	21,085,433	23,264,832	21,765,523
Austria	21,591,230	22,439,127	20,261,782	15,823,151
France	12,337,104	12,678,933	14,380,829	10,084,127
Germany	5,539,157	5,824,823	8,477,758	8,365,677
Italy	6,095,114	11,546,042	4,665,556	3,501,489
America	3,651,338	2,265,857	4,222,194	3,754,273
Egypt	1,320,498	838,873	446,817	276,299
Total	162,122,869	153,657,090	155,514,982	116,041,594

Annex 2.—RETURN of Exports from Greece to the undermen-
tioned Countries during the Years 1889–92.

Countries.	Value in Gold Francs.			
	1889.	1890.	1891.	1892.
England	32,869,722	33,166,081	49,800,487	33,140,370
Russia	2,048,313	939,771	3,184,409	2,088,664
Turkey	16,872,732	15,499,905	10,423,257	8,728,028
Austria	8,961,082	8,802,403	7,240,574	6,376,366
France	32,612,073	21,575,759	25,565,169	14,778,506
Germany	2,518,766	2,410,929	2,801,210	2,872,442
Italy	3,416,076	1,538,596	1,861,876	2,666,566
America	3,332,164	5,809,794	4,026,747	5,154,441
Egypt	2,319,268	2,809,774	838,709	333,518
Total	115,974,249	102,143,951	110,443,501	85,964,601

Annex 3.—TABLE showing the Total Imports at Custom-houses
named during the Years 1887–92.

Ports.	1887.	1888.	1889.*	1890.*	1891.	1892.
	Tons.	Tons.			Tons.	Tons.
Athens and Piræus	46,825,604	43,725,872	...	...	70,878,717	50,661,764
Syra	26,045,435	21,831,265	...	...	18,579,661	10,468,727
Patras	22,827,841	18,545,416	...	...	18,966,906	14,804,189
Corfu	12,127,185	8,165,257	...	...	12,423,217	8,035,039
Zante	5,272,545	4,715,428	...	...	4,790,631	2,588,480
Cephalonia ...	6,838,785	4,114,296	...	...	4,565,395	3,781,430
Calamata	...	...	...	...	3,579,266	4,231,380
Volo	6,425,764	4,904,271	...	...	5,776,074	7,229,195

* It is impossible to extract the totals for these two years as the Greek Government accounts do not show them.

Annex 4.—TABLE showing the Total Exports at Custom-houses named during the Years 1887-92.

Ports.	1887.	1888.	1889.*	1890.*	1891.	1892.
	Tons.	Tons.			Tons.	Tons.
Athens and Piræus	1,443,188	1,591,297	...	...	1,600,744	1,600,000
Syra...	1,957,130	2,200,000	...	...	2,200,000	2,200,000
Patras...	38,000,000	40,000,000	...	...	40,000,000	40,000,000
Corfu...	2,800,000	3,000,000	...	...	3,000,000	3,000,000
Zante...	2,000,000	2,000,000	...	...	2,000,000	2,000,000
Cephalonia...	2,000,000	2,000,000	...	...	2,000,000	2,000,000
Yannina...	1,000,000	1,000,000	...	...	1,000,000	1,000,000
Ioannina...	1,000,000	1,000,000	...	...	1,000,000	1,000,000
Castellorizo...	...	...	...	...	100,000,000	100,000,000

* It is impossible to extract the totals for these two years as the Greek Government accounts do not show them.

Annex 5.—TONNAGE of Ships Entered at the Four Principal Ports of Greece during the Years 1890-93.

Year.	Piræus.	Corfu.	Syra.	Patras.
	Tons.	Tons.	Tons.	Tons.
In 1890	980,806	332,986	425,128	100,800
Of which English ..	200,500	10,000	100,000	60,000
In 1891	1,087,730	500,000	388,800	120,000
Of which English ..	150,000	10,000	100,000	80,000
In 1892	1,307,678	334,679	290,123	231,000
Of which English ..	300,747	7,200	125,442	231,000
In 1893	886,671	400,000	190,000	141,000
Of which English ..	115,686	15,697	112,803	85,697

Annex 6.—TABLE showing the Tonnage of Ships Entered at all the Greek Ports together from the Six Chief Countries during the Years 1890-93.

Year.	Italy.	England.	Austria.	France.	Russia.	Germany.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
1890	400,000	400,000	400,000	400,000	400,000	400,000
1891	400,000	400,000	400,000	400,000	400,000	400,000
1892	400,000	400,000	400,000	400,000	400,000	400,000
1893	400,000	400,000	400,000	400,000	400,000	400,000

Annex 7.—TABLE showing Quantity and Value of Exports from Greece during the Year 1893.

Articles.		Quantity.	Value.
			£
Silk and cocoons	Cwts.	3,264	55,847
Sponges.. .. .	"	2,863	91,625
Cuirants	Tons	188,460	1,850,986
Fruit (fresh and dry)	Cwts.	262,520	107,445
Tobacco	"	51,952	98,126
Olive oil	"	74,800	107,000
Olives	"	24,210	17,430
Soap	"	15,814	21,500
Tanned hides	"	2,031	21,573
Ores	Tons	153,818	600,105
Emery	"	1,000	18,757
Wine in cask	Gallons	4,194,265	187,770
Sundries	"	..	317,930
Total	..	..	3,521,354

Annex 8.—TABLE showing Quantity and Value of Imports into Greece during the Year 1893.

Articles.		Quantity.	Value.
			£
Live stock	Head.. ..	81,708	115,837
Hides	Cwts. . . .	56,908	148,612
Fish, caviare, &c.	"	97,265	161,968
Wheat and meslin	Bushels	3,677,954	982,060
Coffee and chicory	Cwts. . . .	20,954	92,197
Wood and timber	Cub. metres	51,595	138,300
Coal	Tons	187,053	299,285
Raw metals	"	7,440	74,990
Sugar	Cwts. . . .	112,054	116,536
Cotton tissues	"	25,614	214,527
Woollen and hair tissues	"	9,040	161,441
Common iron goods and hardware	"	51,838	76,790
Sundries	"	..	1,126,854
Total	..	..	3,659,397

RETURN of British Shipping at the Port of Piræus in the Year 1893.
Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.									
Total Number of Vessels.		Tonnage.		Total Number of Vessels.		Tonnage.		Total Number of Crews.	
With Cargo.	In Port.	With Cargo.	Total.	With Cargo.	Total.	With Cargo.	Total.	With Cargo.	Total.
75	1	81,518	2,413	83,931	1,418	£	...	134	...
Left.									
75	1	81,518	2,413	83,931	1,418	£	...	134	...
Total.									
150	2	163,036	4,826	167,862	2,836	£	...	268	...

Entered.									
Number of Vessels.		Tonnage.		Number of Vessels.		Tonnage.		Number of Crews.	
With Cargo.	In Port.	With Cargo.	Total.	With Cargo.	Total.	With Cargo.	Total.	With Cargo.	Total.
75	1	81,518	2,413	83,931	1,418	£	...	134	...
Left.									
75	1	81,518	2,413	83,931	1,418	£	...	134	...
Total.									
150	2	163,036	4,826	167,862	2,836	£	...	268	...

Indirect or Coasting Trade in British Vessels from and to other Countries.

Entered.									
Number of Vessels.		Tonnage.		Number of Vessels.		Tonnage.		Number of Crews.	
With Cargo.	In Port.	With Cargo.	Total.	With Cargo.	Total.	With Cargo.	Total.	With Cargo.	Total.
75	1	81,518	2,413	83,931	1,418	£	...	134	...
Left.									
75	1	81,518	2,413	83,931	1,418	£	...	134	...
Total.									
150	2	163,036	4,826	167,862	2,836	£	...	268	...

RETURN of British Shipping at the Port of Volo in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.		Total Number of Vessels.			Total Tonnage.	
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.
14	...	14	16,137	...	1	...	1	1,500	...
			Total Value of Cargoes.					Total Value of Cargoes.	
			323					25	
			£ 12,200					£ 300	

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.					Cleared.				
Number of Vessels.			Tonnage.		Number of Vessels.			Tonnage.	
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.
5	...	5	4,620	...	1	...	1	1,118	...
...	...	1	1,300	...	19	2	21	21,205	...
...	...	2	2,730	...	...	...	...	2,222	23,427
...	...	1	1,258	...	...	...	...	...	...
...	...	...	...	...	...	...	...	...	...
6	3	9	5,878	4,030	20	2	22	22,323	24,546
Total ...			9,903		Total ...			24,546	
			13,346					7,260	
Country whence Arrived.			Value of Cargoes.		Country to which Departed.			Value of Cargoes.	
Belgium ..	...	...	...		Greece ..	...	...	£	
Greece ..	...	...	106		Turkey ..	...	...	22	
Turkey ..	...	...	25					459	
United States ..	...	...	58					7,260	
...	...	...	24					...	
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Nº. 1416.

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AND FINANCE.

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REPORT FOR THE YEAR 1893-94
ON THE
FINANCES OF GREECE.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1169.

*Presented to both Houses of Parliament by Command of Her Majesty,
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GREECE.

ATHENS.

Mr. Egerton to the Earl of Kimberley.

My Lord,

Athens, May 16, 1894.

I HAVE the honour to transmit to your Lordship herewith a Report by Mr. Elliot on the Finances of Greece for the year 1893-94.

I have, &c.

(Signed) EDWIN H. EGERTON.

Mr. Elliot to Mr. Egerton.

Sir,

Athens, May 16, 1894.

I HAVE the honour to submit to you herewith my Report on the Finances of Greece for the year 1893-94. I am very conscious of its deficiencies, but hope that at least the Tables attached to it will be found of some value. In preparing them, I have, as far as possible, adopted Mr. Law's Tables as a model. In the Revenue Tables I have adopted his classification entirely. In the Expenditure Tables, not being certain of the principles upon which he departed from the official classification, I have preferred to adopt the latter.

I have once more to express my acknowledgments of Mr. Martelaos' willing and efficacious assistance.

I have, &c.

(Signed) F. ELLIOT.

Report on the Finances of Greece for the Year 1893-94.

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Summary of Events, 1893-94.

The history of Greek finance during the past year is disastrous but simple.

In the spring of 1893 it was admitted on all hands that a loan was an absolute necessity for the Greek Government, and M. Tricoupi was engaged for many weeks in active negotiations with Messrs. Hambro for concluding one. Before the prorogation of the Chamber he had obtained the passage of a Bill providing for the collection in gold of certain taxes (the duty levied at export upon currants, and others) which he estimated to produce 8,600,000 dr., and which he was prepared to offer, together with other taxes already leviable in gold, as security for the new loan.

He refrained, however, from submitting this Bill for the Royal Assent until the loan should be concluded. The negotiations were protracted, and the terms demanded were, as was to be expected, hard; but an agreement appeared to be on the point of being concluded, when a difficulty arose at the last moment, and M. Tricoupi suddenly resigned office on May 9.

Resignation of
M. Tricoupi.

It is unnecessary to record here the details of this abortive loan, the conditions under which the negotiations were carried on having gone for ever; and it would be unprofitable to attempt to fix the responsibility for their falling through.

The effect of the failure, and of the resignation of the only Greek financier in whom the foreign markets had any confidence, was immediately felt in a heavy fall in the price of Greek securities, and the rise in the price of the gold drachma from 1 dr. 43 l. to 1 dr. 63 l. The difficulties of the situation inherited by M. Sotiropoulos, M. Tricoupi's successor as Prime Minister and Minister of Finance, were thus greatly aggravated, but he entered upon his task with the determination to turn a deaf ear to suggestions of repudiation, and to devise if possible a means whereby Greece should continue to pay her liabilities.

M. Sotiropoulos'
Ministry.

The result of his endeavours was the conclusion, on June 11, of a convention with Messrs. Hambro for the so-called "funding loan." The loan was for 100,000,000 gold dr. or 4,000,000% at 5 per cent. It was guaranteed upon the proceeds of the gold taxes above referred to, the law which sanctioned them being brought into operation simultaneously with the signature of the loan convention. These revenues were to be paid over to a "Caisse" constituted for the purpose by the National, Ionian, and Epiro-Thessalian Banks. The object of the loan was as follows:—The interest on all the gold loans of the State, with the exception of the monopoly loan, was for two years and a half to be paid in bonds of the funding loan; which were also to be employed in redeeming the loan of 16,500,000 dr. of 1892, and a portion of the floating debt. The Government, moreover, undertook to repay to the banks the forced currency loan at the rate of 1,000,000 dr. per month.

Funding loan
concluded.

The Government hoped by means of this arrangement to tide over the immediate difficulties of the situation, and to arrive at some solution of the currency question before the expiration of the two years and a half during which the drain of gold would be stayed by the operation of the device for the payment of the coupons in bonds of the new loan. It did not, however, inspire the market with confidence. It was attacked as extravagant and unprofitable by the opposition, including M. Tricoupi. Although immediately operative, the convention required the eventual sanction of the Chamber; and in the Chamber M. Tricoupi commanded a majority of three-fourths, while M. Sotiropoulos had hardly any following at all. The Government, conscious of their weakness, neither convoked the Chamber nor appealed to the country, in the hope that public

Opposition
to it.

opinion would become convinced of the expediency of their measure by experience of its working.

They gained nothing by the delay. On the contrary, towards the end of August the difficulty of finding gold for the payment of the currant tax was such that the Government felt constrained, in direct breach of their loan convention, to permit the collection of the tax in paper at the rate of 1 dr. 65 l. per franc. Moreover, as time went on, it became apparent that the funding loan was only a temporary relief, and that the finances of Greece would not recover themselves without further assistance.

Ornstein
negotiations.

Accordingly, towards the end of September, the Government entered into communication with a financial group represented in Athens by Mr. Ornstein. The negotiations, which included on the one hand an offer of a composition, and on the other a demand for the limitation of the administrative expenditure of the Government, and for some kind of control on behalf of the bondholders over the revenues assigned for the service of the debt, were still in progress when the Chamber met in the ordinary course, and M. Sotiropoulos was driven from office on November 9, and replaced by M. Tricoupi, whose majority in the Chamber, although diminished, was sufficient.

Defeat of
M. Sotiropoulos.

M. Tricoupi
in office.

M. Tricoupi's first act was to suspend the collection in gold of the taxes pledged to the funding loan (except such as were already collected in gold before that arrangement), and he afterwards rapidly passed through the Chamber a Bill repealing the law under which those taxes were levied in gold; and another Bill annulling the funding loan convention, but providing for the payment of the bonds already issued in virtue of it, to the amount of about 11,500,000 dr. These Bills were passed by the Chamber on December 13 and 14.

Gold taxes
and funding
loan
cancelled.

The action of the Government in annulling the gold taxes by Ministerial Order produced a bad impression, which was intensified when on December 13 M. Tricoupi submitted a Bill authorising the Government to negotiate with the bondholders of Greek gold loans for a modification of their terms; and in the meantime to pay provisionally 30 per cent. on the coupons as they fell due, to suspend the sinking funds, and to cause all revenues assigned for the service of the debt to be paid into the public Treasury.

Reduction of
interest by
70 per cent.

In introducing this Bill M. Tricoupi repeated the statements with which the public is familiar, that there was no want in the Treasury, and that the currency was the only difficulty. He said that he was in hopes of negotiating with a group of foreign capitalists for the strengthening of the National Bank, and for a loan to be applied to the reduction of the excessive paper circulation. But as no loan could be concluded in time to provide for the immediate requirements of the coupons, he was obliged to ask authority for the provisional payment of 30 per cent. only, pending a definitive arrangement with the creditors of the State. He pointed out that Greece could not at present pay more than 7,750,000 fr. per annum in gold abroad without disturbance of the

exchange; and he insisted on the provisional character of the measure, and on the fact that, although the assigned revenues were to be diverted into the Treasury, there was no intention of infringing the validity of the guarantees.

Notwithstanding M. Tricoupi's assurances, it was felt, in the first place, that while offering to negotiate with the creditors of Greece, he was by this measure practically dictating his own terms to them; and in the second place, that the diversion of the assigned revenues, especially those of the monopoly loan, which were collected by a special "Caisse," without a previous understanding with the bondholders, was a breach of contract. It called forth official protests from foreign Governments on behalf of bondholders; but the measure was, nevertheless, passed into law, and was promulgated on December 23, together with the laws abolishing the collection of taxes in gold, and annulling the funding loan convention. The negotiations with the financiers represented by Mr. Ornstein, which had been continued by M. Tricoupi, at the same time came to an end.

The way being thus cleared, M. Tricoupi on January 2, submitted to the Chamber his budget for 1894. In introducing it he began by referring to the final results of the financial year 1892, which closed on October 31, 1893. The assessments of ordinary revenue for that year exceeded the budget estimate by 727,000 dr., but the arrears of collection amounted to nearly 9,400,000 dr., and the total actual receipts were 94,882,884 dr. The ordinary expenditure amounted to 97,340,847 dr., or 2,600,000 dr. less than the budgetary estimates, notwithstanding the addition of 4,900,000 dr. of supplementary credits. The final deficit of the year, on the ordinary budget, amounted, therefore, to 2,457,963 dr., a result which satisfactorily confuted the prophets who had predicted a deficit of 20,000,000 dr. to 30,000,000 dr.

Passing to the budget of 1893, M. Tricoupi announced a serious falling-off in the revenue. While the receipts from oil, tobacco, stamps, and some other classes were satisfactory, customs showed a falling-off of nearly 7,500,000 dr. on the estimate, and would barely reach 22,000,000 dr., instead of 29,500,000 dr. This was partly due to the magnificent harvest in Thessaly, which caused a diminution in the receipts from the duties on wheat during the latter half of the year; but throughout the year the receipts on other articles of consumption showed a great falling-off.

The budget of 1893 provided a sum of 8,850,000 dr. for making good the loss on exchange in the service of the debt. But after the failure of the loan negotiations in the spring, this sum would have been insufficient for the purchase of the gold required, and such purchase would, moreover, have aggravated the condition of the money market. Other means were, therefore, resorted to, namely, the capitalisation of the interest by means of the funding loan, subsequently cancelled. But the amount of gold remaining to be provided after that operation, was still in excess of what the country could afford.

It was, therefore, evident that Greece could no longer pay her
(1784)

liabilities in full. Hitherto the difficulty had been caused by the depreciation of the paper currency, but the diminution of the revenue, especially from customs, proved that the insufficiency of the country would continue to exist even if the paper currency recovered its par value. Accordingly the law providing for the payment of 30 per cent. only of the interest of the gold debt was passed; the effect of it being that 8,000,000 dr. in gold would suffice for the service of the debt, whereas with the funding loan, 9,200,000 dr. would have been required, without taking into account the progressive increase of the debt. The whole sum assigned to the service of the debt in the budget for 1894 was 22,500,000 dr.

It was desirable, said M. Tricoupi, that with a view to allot the largest possible share to the creditors of Greece, the engagements that could be fulfilled towards them in future should be exactly ascertained. He had kept this object in view in framing the estimates for 1894. Believing that the diminution of receipts from cereals and other articles of consumption would continue, he estimated his receipts from customs at 18,000,000 dr., or 11,000,000 dr. below his estimate for 1893. Calculating the total revenue on the basis of the actual receipts, and not as had hitherto been done on the assessments, he obtained a total estimate for 1894 of 87,134,000 dr. only.

That being the case, the expenditure must be limited to 87,000,000 dr. But the expenses of administration had already been cut down to the lowest possible figure, and amounted (with the 22,500,000 dr. available for the service of the debt) to 86,370,000 dr., leaving an estimated surplus of 764,000 dr.*

The estimates had been framed with caution, and if the commercial credit of the country were restored, the surplus would doubtless be largely increased. If that should occur, the national creditors must take a large share in it. In the meantime the negotiations with them were hardly begun. But the first point to be aimed at was the reduction of the forced circulation.

Budget voted. After long and sterile debates the budget was voted with but slight modifications, and was promulgated on March 19, the Chamber thus a second time sanctioning the payment of 30 per cent. of the interest on the gold loans, and indirectly affirming that the promised negotiations with the bondholders must be carried on upon that basis.

Currant crisis. Before the prorogation the Chamber was several times occupied with the consideration of the currant question. The glut resulting from over-production, coupled with the loss of the French market, produced a fall in prices such that, in the districts growing the inferior qualities, the cost of production was not covered, and considerable distress was the result. Several proposals for alleviating the distress, and for relieving the trade of the large surplus stocks which hampered their opera-

* The estimates of revenue and expenditure were slightly modified before being passed. They are given in the tables in their final form.

tions and kept down prices were discussed, but no conclusion was arrived at. I would refer for fuller information on this subject to Mr. Consul Wood's Report, No. 1331 of 1894, merely observing that the legislation referred to in it (p. 9), as under consideration at the time he wrote, was not completed. The currant industry will doubtless recover of itself in the course of a few years, when production has been restricted to the amount that the markets of the world are able to consume.

I now proceed to an analysis of the returns of revenue and expenditure for 1892, and of the estimates for 1893-94.

Analysis of Results, 1892.

The final figures of revenue and expenditure will be found in Tables I and VI. In Table I (revenue) I have arranged in parallel columns the official estimate, Mr. Law's estimate, the total receipts, and the arrears on assessment. Compared with Mr. Law's estimate, and without reckoning the receipts on account of primary education, for which from want of data he framed no estimate, the actual receipts show an excess of 2,000,000 dr. spread over nearly every class of revenue, the principal excess being 600,000 dr. in the revenue from customs, which was extraordinarily remunerative. Compared with the official estimate there is a deficiency of 7,387,808 dr. But the official estimates were based on the assessments, and, as Mr. Law pointed out (p. 10 of his Report), an allowance of at least 7,300,000 dr. must be made for arrears on assessment. As, however, the actual arrears on assessment amounted to 9,394,993 dr. the ratio of the actual receipts to the official estimate was satisfactorily high.

In Table IV I give a summary of the arrears and the collection on account of arrears in continuation of Mr. Law's Table B I.

The figures of revenue for 1892 do not call for any particular remark in detail. The excess in the revenue from customs was partly due to increased importation towards the end of the year in anticipation of the higher duties which came into force on January 1, 1893.

The ordinary expenditure for 1892 amounted to 97,340,847 dr., or 2,645,282 dr. less than the original official estimate of 99,986,129 dr., exclusive of the supplementary credits of 4,902,081 dr. There is an excess of 2,000,000 dr. over the estimate in the charge for the public debt, and a decrease of 800,000 dr. in that for the Department of the Interior; 1,200,000 dr. for the army, and 1,150,000 dr. for the navy. The actual deficiency of ordinary revenue to meet ordinary expenditure was 2,457,963 dr.

It will be noticed that there is a discrepancy between the figures given as "Budgetary estimated Expenditure" in my Table VI and those under the same heading in Mr. Law's Table D VII. The explanation of it is that I have adopted the official classification, while Mr. Law added to the general budget the

whole of the special budgets of the road-making and lighthouse funds. Part of these budgets, to the extent of 2,230,000 dr., were included under the class "Department of Finance, sundry payments," and the charge for that class is reduced by so much in Mr. Law's table, while the charges for the Ministries of the Interior and of Marine are increased by the full amount of the special budgets mentioned. In the estimates for 1893-94 the road-making fund is officially included in the charges for the Department of the Interior.

Analysis of Estimates and Partial Results, 1893.

Estimates of
revenue,
1893.

In Table II will be found in parallel columns the official estimate, Mr. Law's estimate, the revenue returns for the first 12 months of the financial year, the average receipts of the same period for the preceding 3 years, the percentage of those receipts to the total during the same period, and a revised estimate for the year.

The official estimate is, as usual, based on assessments. Mr. Law's estimate based on actual receipts is explained at pp. 50-52 of his Report, to which reference is made in the remarks below. The figures of the official estimate are taken from the Budget Law as finally passed, and differ in the total by 367,167 dr. from those given in Table A X of Mr. Law's Report, which was given to him before the budget was actually passed into law.

"Anchorage dues" have been separated from "lighthouse dues" and placed under the heading "stamps and dues." Mr. Law's estimate of "lighthouse dues" for 1892 has, therefore, been repeated for 1893, and the balance of his estimate of "lighthouse and anchorage dues" has been added to his estimate of the sub-head "fines and sundries." The figures of the revised estimate for 1893 are based on the percentages of the collection for the first 12 months of the preceding 3 years, except where otherwise indicated below.

Direct taxes.

Ploughing animals.—The effect of the higher rate has exceeded Mr. Law's anticipations. The percentage rate would give 2,500,000 dr., but the returns of assessments and revenue to the end of February, 1894, do not justify an estimate of more than 2,250,000 dr.

Oil.—The olive crop was extraordinarily good, and the anticipated revenue is more than double either Mr. Law's or the official estimate. The percentage would give 3,000,000 dr.; but the budget (1894) statement puts the revenue for 1893 from this source at 2,300,000 dr., which figure has been taken in the revised estimate.

Wine.—The vintage was also good. The percentage is inapplicable; but the assessments to the end of February amount to 2,400,000 dr., which figure has been taken as the final estimate of receipts.

Currants, Ionian Islands, Tax on Net Profits, and Sundries.—The deductions from the estimates of these taxes, on the ground of their being payable in gold at a reduced rate, are not wholly applicable, the law under which they were levied in gold having only been 5 months in force. The revenue from these four classes will come very near Mr. Law's estimate.

* *Cattle Tax.*—The new system of levying this tax has not resulted in any increase of revenue. The percentage gives 2,588,000 dr., but the assessments and revenue to the end of February, 1894, do not justify an estimate of more than 2,200,000 dr.

License and House Taxes.—The promise of better collection has apparently not been kept. There will be a deficiency on the estimates; due no doubt partly to the depression of trade, the effect of which is chiefly felt in the towns.

Tax on Net Profits.—The great deficiency is, no doubt, partly due to the depression of trade, but partly also to the collection in gold, which gives rise to questions of account, owing to which the whole amount received is not at once paid over to the Treasury.

On the whole the revenue from the direct taxes is coming in in a satisfactory manner, and appears likely to exceed Mr. Law's estimate by over 1,000,000 dr.

In the *customs duties* there is the serious deficiency of ^{Duties and excise.} 6,000,000 dr. on Mr. Law's estimate, and 7,000,000 dr. on the official estimate. In Table V will be found a comparison of the revenue from customs in 1892-93, distinguishing between the revenue from wheat and that from all other imports. (This table was presented to the Chamber by M. Tricoupi in a memorandum prefixed to the budget of 1894.) The revenue from wheat shows an increase for the year of 660,000 dr., the effect of the increased duty. The increase is distributed with tolerable evenness over the whole year, excepting the months of August, September, October, and November, when the effect of the bountiful harvest of Thessaly reduced the importations considerably below the figure for the corresponding period of 1892.

The revenue from other classes of imports, however, shows a continued decline throughout the year (with the single exception of the month of April). There can be no question but that the depression of trade, caused by the high rate and continued fluctuations of the exchange, is responsible for a great part of this deficiency. But it would be a mistake to ascribe it entirely to that cause. In the latter part of 1892 the imports were considerably increased in anticipation of the augmentation of duties which took effect at the new year; and while the actual imports of the early months of 1893 were diminished to a corresponding extent, the imports of the later months also suffer by comparison with the abnormally inflated imports of the corresponding period.

Excise on Tobacco.—The final results are now known within a few thousands, and show a very satisfactory excess.

Excise on Spirits.—Actually collected, 345,000 dr.; further assessments already made, 145,000 dr.

Excise on Wine sold by retail.—Actually collected, 195,000 dr.; further assessments already made, 105,000 dr.

Stamps and
dues.

The revenue from stamps and dues was well maintained, and calls for little remark. In *stamps, post, and telegraphs* the final results are now known within a few thousands.

Anchorage Dues.—In explanation of the low figure given for the receipts of the 12 months, I am informed that the whole amount received has not yet been accounted for, owing to questions of account connected with the collection in gold. A similar explanation applies to the revenue from *lighthouse dues*.

Fines and Sundries.—The percentage calculation gives 2,295,000 dr., but at the rate at which the revenue came in during January and February, the total for the year would only amount to about 1,885,000 dr. A mean has been taken in the revised estimate.

Monopolies.

Of the monopolies, *petroleum and salt* show a considerable falling-off. In the case of petroleum the increase of price has, perhaps, restricted consumption.

Revenue from
State
property
Sundry
repayments,
&c.

The *Revenue from State Property* promises to approach very nearly to Mr. Law's estimate.

Pension Fund.—The small amount encashed is said to be due to an arrangement by which the greater part of the retentions from salaries will be effected at the end of the financial year. The figure taken for the revised estimate is in the same proportion to the budget estimate as the receipts for 1892 to the estimate for that year.

Miscellaneous.—The 12 months' receipts are increased by 137,830 dr. of extraordinary contributions for the destruction of field mice. Deducting that sum, the 12 months' receipts amount to 66,618 dr., the percentage calculation on which gives 195,935 dr., making, with the field mice contribution, 333,765 dr. for the revised estimate.

Sundry
receipts and
arrears.

Occasional and Sundries.—Already encashed, 2,390,670 dr., of which a sum of 1,900,000 dr. is due to the difference of exchange on the current tax leviable in gold, but collected in paper at the rate of 1 dr. 65 l. from August to November (see p. 4).

Arrears.—The result appears to justify Mr. Law's estimate.

Education
tax.

Receipts on account of Primary Education.—This tax having only been imposed in 1892, the percentage calculations are based on one year's receipts only.

Police tax.

Communal Contributions for Police.—The new military police only having come into existence in 1894, no contributions were called for on this account.

It appears, therefore, that, with the exception of customs, the revenue returns for the first 12 months of the financial year 1893 show satisfactory results, and promise slightly to exceed Mr. Law's estimate, if that item and the contributions for police be left out of account.

Expenditure.

Turning to the expenditure, Table VII, it will be noticed at

once that the budgetary estimate largely exceeds that given under the same heading in Mr. Law's Table D VIII, Mr. Law having omitted from his table the credit of over 8,000,000 dr., which, as stated on p. 23 of his report, "the Minister of Finance has taken the authority of the Chamber to dispose of, for such financial operations as may appear desirable for the purpose of supporting the national credit."*

It will further be remarked that supplementary credits to the amount of nearly 5,000,000 dr. have deceived the hopes that were entertained that the special care devoted to the estimates for 1893 would reduce the unforeseen expenditure to insignificant proportions. The Department of the Interior claims an extra credit of nearly 2,000,000 dr. for roads, and those of War and Marine, 1,250,000 dr. for pay and sundries.

The actual expenditure for the financial year, up to the end of February, 1894, amounted to 64,678,688 dr. Owing to the different operations for curtailing the interest on the debt, the actual expenditure on account of the debt was only 11,152,308 dr. out of the credits of 44,317,635 dr. The expenditure for other services was 53,526,380 dr. out of credits to the amount of 66,300,101 dr.; the credits remaining unexpended at the end of February being therefore 12,773,721 dr., exclusive of credits on account of the debt charge, thus more than realising Mr. Law's anticipation that the supplementary credits would be balanced by the amount of the unexpended credits. With a revenue which, as above stated, should nearly reach 95,000,000 dr., there should therefore be a substantial surplus to set off against the accumulated deficits of former years, to which attention will be called further on.

Analysis of Estimates, 1894.

In the explanatory memorandum prefixed to the budget as presented to the Chamber, it is stated that the figures which the Chamber is asked to vote are for the first time based upon the actual receipts and not on the assessments. They are, as a rule, founded on the average receipts for the past 3 years (arrived at by deducting the average arrears from the average assessments), unless the assessment for the last year was the lowest of the three, in which case it alone is taken. When this principle is departed from the reason is given in the memorandum.

Table III gives the official estimate of revenue, together with a revised estimate prepared by me. The following analysis is summarised from the budget memorandum; the remarks between brackets being my own.

Ploughing Animals.—The estimate is based on the assessments of 1893, less 21 per cent., the average arrears of this tax. [The

*Estimates of
revenue, 1894.*

Direct taxes.

* Mr. Law's Table D. VIII and the corresponding table of estimated revenue for 1893, deal with a condition of affairs without any new financial operation, and show a surplus of over 4,000,000 fr. At p. 19 of his report he shows how this surplus, and certain sums to be saved by the proposed financial operations (in all 7,500,000 fr.) are to be dealt with.

12 months' returns for 1893 would seem to allow of a higher estimate.]

Oil.—The olive crop being alternately heavy and light, it is not safe to estimate for more than 900,000 dr. after the extraordinary crop of 1893.

Wine.—Based on the assessment of 1892, less 23 per cent., the average arrears. [The returns for 1893 would seem to allow of a higher estimate.]

Currants.—Based on the average returns for 3 years, less 10 per cent. for probable diminished production owing to the crisis in the currant trade. [Restricted production will not affect the revenue, the tax being levied on exportation, and the existing stocks being more than sufficient. But there is no probability of greater consumption than in 1893, and the estimate cannot be raised.]

Ionian Islands.—The estimate is framed as follows:—

From—						Amount.
						Drachmæ.
Currants	..	..	..	..	..	695,000
Oil	..	..	..	..	..	1,552,500
Sundries	..	..	..	..	..	182,500
Total	..	..	..	..	..	2,430,000

[The estimate appears high, compared with the yield of 1893.]

Cattle.—Based on the assessments for 1893, less 23 per cent., the average arrears. [The 12 months' returns for 1893 seem to justify a somewhat higher estimate. No account is taken of the increased facility of collection anticipated when the method of levying the tax was changed.]

License Tax.—The average of assessments for 3 years is 3,600,000 dr., which must be reduced by 38 per cent. for the average arrears, with a further allowance for depression of trade.

House Tax.—The average of assessments for 3 years is 2,600,000 dr.; average arrears, 29 per cent.; allowance for depression of trade, 10 per cent. [The estimates for the two preceding taxes agree exactly with the probable revenue for 1893.]

Tax on Net Profits.—The revenue for 1892 was 150,000 dr. less than that for 1891. The diminished profits of joint stock companies do not justify a higher estimate than 200,000 dr.

Sundries.—Some slight additions to taxation justify an increased estimate.

Duties and
excise

Customs.—The revenue for 1893 showed a deficiency of 7,000,000 dr. on the estimate. This deficiency having accrued chiefly during the latter half of the year, it is not safe to anticipate for 1894 even the same revenue as was received in 1893. If the falling-off in the revenue from the duty on wheat alone be continued, the diminution on that account would reach 2,000,000 dr. The estimate for customs is therefore taken at 18,000,000 dr. only.

[I have already pointed out (p. 9) that the diminution of the revenue from customs must not be ascribed entirely to the depression of trade. M. Tricoupi's memorandum was written before the results of December were known, and Table V, as published by him, was consequently incomplete. As regards the wheat duty, the results of December do not support his argument. So far from the falling-off being continued, the revenue from wheat in December shows an increase of 100,000 dr. over December, 1892.

The customs returns for January and February, 1894, compared with 1893, are as follows :—

REVENUE from Duty on Cereals.*

				Amount.		
				1893.	1894.	Difference.
				Drachmæ.	Drachmæ.	Drachmæ.
January	..	..	..	310,733	276,135	— 34,598
February	..	..	..	439,840	413,576	— 26,264

REVENUE from other Import Duties.

				Amount.		
				1893.	1894.	Difference.
				Drachmæ.	Drachmæ.	Drachmæ.
January	..	..	..	1,126,539	1,198,504	+ 71,965
February	..	..	..	1,294,666	1,348,920	+ 54,254

* The provisional monthly returns do not distinguish the duty on wheat from that on other cereals, but wheat is about 97 per cent. of the whole.

It will be seen that the diminution in the revenue from cereals is small, while on the other hand there is actually a small increase in the revenue from other import duties. These figures are far from indicating a revival of trade, but they justify, I think, an anticipated customs revenue of not less than last year, say, 22,500,000 dr.

If the agricultural statistics were reliable, it should have been possible to make an accurate estimate of the quantity of imported wheat required before next harvest, from the stocks remaining in Thessaly.]

Tobacco.—The steadily progressive rate of consumption justifies the higher estimate.

Excise on Spirits.—With a view to encourage distillation from currants this tax has been removed from native spirits, and maintained only on foreign spirits and on native and foreign beer.

Stamps and dues.	<i>Excise on Wine sold by retail.</i>—The estimate is the same as for 1893. [This tax was only imposed in 1893. The returns for that year seem to indicate that the estimate is too high.]
	<i>Stamps.</i>—Based on the revenue of the first ten months of 1893.
	<i>Consular Fees.</i>—Based on the mean of 3 years. [1892 and 1893 having produced less than the mean, the estimate should be slightly reduced.]
	<i>Post.</i>—Estimated on the revenue for 1893.
	<i>Telegraphs.</i>—Estimated on the average of 3 years. [The revenue increasing progressively, it seems justifiable to take the revenue of 1893.]
	<i>Exemption from Military Service.</i>—Based on the revenue for 1893.
	<i>Anchorage Dues.</i>—The estimate for 1893 is repeated. [The returns of 1893 are no guide to an estimate.]
Monopolies	<i>Fines and Sundries.</i>—Based on the average of 3 years.
	<i>Cigarette Paper.</i>—The estimated increase is proportionate to the increased consumption of tobacco.
	<i>Playing Cards.</i>—A slight decrease resulting from the suppression of gambling saloons.
	<i>Matches.</i>—Increased rapidly in the years 1890 to 1892, justifying an increased estimate [but they fell off in 1893].
	<i>Petroleum.</i>—Based on the returns for the first ten months of 1893, with allowance for increased consumption. [As the consumption fell off from 1892 to 1893 the increased estimate would not be justified, but that November and December produced more than was anticipated.]
	<i>Salt.</i>—An increase of 100,000 dr. is expected over the receipts of 1893. [As the consumption in 1893 was below the average, the increased estimate is not justified.]
Revenue from State property.	<i>Real Property.</i>—Based on three years' averages.
	<i>Royalties, &c.</i>—Based on three years' averages. [In view of the revenue for 1893, the estimate seems too high.]
	<i>Forests.</i>—Based on three years' averages. [This revenue is steadily progressive; the results of 1893 justify a higher estimate.]
	<i>Fisheries.</i>—The estimate for 1893 is repeated.
	<i>Sale of Sundry State Property.</i>—Based on the average of three years.
Sundry repayments, &c.	<i>Repayment of Advances.</i>—The average of three years is no guide in this case. The estimate must be somewhat arbitrary.
	<i>Pension Fund.</i>—The estimate for 1893 is repeated. [I repeat my estimate for 1893 as explained at p. 10.]
Sundry receipts and arrears.	<i>Occasional and Sundries.</i>—The revenue is swelled by 1,500,000 dr. resulting from the minting of nickel coins.
	<i>Arrears.</i>—Based on averages of two years.
	<i>Lighthouse Dues.</i>—The estimate for last year is repeated.
Education tax.	<i>Contributions for Education.</i>—Based on the receipts of 1892. [As the first 12 months' collection of 1893 was better than that of 1892, a higher estimate would seem to be justified.]

Contributions for Police.—A new tax.

Police tax.

The total official estimate of revenue for 1894 is 88,749,669 dr., but, under the impression that M. Tricoupi has under-estimated the revenue from customs, I put it at 93,150,000 dr.

The official estimate of expenditure amounts to 87,693,158 dr. Estimate of expenditure.

Of this, in consequence of the law for the provisional reduction of the interest of the debt and the suspension of the sinking funds, only 21,999,083 dr. is put down for the service of the debt, as against 35,739,876 dr. actually expended in 1892, and 44,317,635 dr. estimated for 1893. But the estimates for the Administrative Departments show an increase, amounting to 47,486,409 dr., as against 43,560,384 dr., the actual expenditure of 1892,* and 44,557,084 dr., the original estimate for 1893. It is true that the latter sum has been increased to 48,349,661 dr. by supplementary credits; but while, on the one hand, it is certain to be reduced by the unexpended credits, it is, on the other hand, unfortunately certain that supplementary credits will be required for 1894, whatever care has been bestowed on the preparation of the estimates; and where expenditure has been cut down to the lowest possible point, an increase of the estimates is actually evidence of the desire to avoid supplementary credits. In 1892, notwithstanding supplementary credits of nearly 5,000,000 dr., the actual expenditure fell short of the original budgetary estimate by 2,500,000 dr.; and it may be hoped that, with economy in the administration, a similar result will be attained in 1894. There is, therefore, a probability of Probable surplus. M. Tricoupi's estimated surplus of 1,055,511 dr. being exceeded; indeed, if my anticipations of the customs revenue be not too sanguine, it may reach 6,000,000 dr. or 7,000,000 dr. A portion Probable extraordinary expenditure. of this will be absorbed by extraordinary expenditure, for which no provision is made in the budget, such as the cost of construction of the Piræus-Larissa Railway (unfortunately, owing to the cessation of the works, a small amount), the relief of the sufferers by the destructive earthquakes in Bœotia, Locris, and Eubœa, and possibly other items. It is to be noted also that no provision is made for the reduction of the forced circulation, which, all the authorities are agreed, must be the first step to financial recovery.

It is of the utmost importance that no addition be made to Accumulated deficits. the monstrous burden of the accumulated deficits of years past, which has clung as a dead weight to successive Ministers of Finance, and paralysed every effort to place the finances on a sound footing. Two instructive tables published with the "exposé des motifs" of the budget of 1894 are reproduced below as Tables IX and X. They show that in the 11 years from 1882 to 1892 the aggregate excess of expenditure over revenue from all sources amounted to 61,370,908 dr.

* As compared with 1892, the increase is largely a matter of account, arising, for instance, from the incorporation of the road fund in the budget of the Minister of the Interior. The budget of education is also largely increased by the new system. See Mr. Law's Report, p. 12.

It is, therefore, questionable whether it would be expedient for the creditors of Greece, in their own interest, to demand more than has been offered to them by M. Tricoupi; but the negotiations about to be commenced may result, to the convenience of both parties, in a rearrangement of the guarantees for the service of the debt, and in an understanding as to a proportional increase in the amount allotted to it, according to the ability of the State, in better days to come.

Public Debt.

Debt.

Table XI, taken from the memorandum prefixed to the budget of 1894, shows the whole amount of the permanent debt contracted since the establishment of the kingdom in 1832, the amounts paid off, and the amounts outstanding on May 31, 1893.

Table XII, which I have prepared from the budget estimates, shows the situation of the debt, both permanent and floating, on March 31, 1894, the credits voted for 1893, the normal requirements for 1894, and the credits voted for 1894. The effect of recent measures on the provisions for the service of the debt is there seen at a glance. The interest on all the permanent debt in gold (excepting the loan of 16,500,000 dr.) is reduced by 70 per cent., and the sinking funds are suspended. The loan of 16,500,000 dr., contracted in gold in 1892 with the National Bank, was by agreement with that bank converted into a paper loan, the interest and sinking fund remaining payable at the same rate as before, but in paper instead of gold. The interest on the permanent debt in paper remains unchanged, there being no difficulty in finding paper to meet it. The sinking fund on the loan of 15,000,000 dr., the only currency loan to which a sinking fund of the ordinary kind is attached, is, however, suspended.

Floating debt.

With regard to the floating debt, it will be noticed on comparison of Table XII with Mr. Law's Table E I that all the provisional loans have been renewed with the exception of those of 35,000*l.* and 7,300,000 fr. respectively. These have been paid off in currency, and the charge for the floating debt is thus reduced from 927,274 dr. to 860,316 dr.

Loss by
exchange.

A sum of 6,939,730 dr. is set aside for the estimated loss by exchange on the purchase of gold even for the diminished coupon. This sum was calculated at the rate of 1 dr. 70 *l.* to 1 fr. on 9,913,900 dr., the amount of the gold credits originally asked for; but as the gold credits were reduced to 9,432,768 dr. before they were voted, the estimate for the loss by exchange should have been reduced by 336,793 dr. The actual rate of exchange for gold is, however, at this moment 1 dr. 73½ *l.*, at which rate the loss by exchange for the year on the gold credits would be 6,933,084 dr., or almost exactly the amount voted on a different assumption.

Table I.—REVENUE for Financial Year, 1892.

Classification.	Description.	Official Estimate.	Mr. Law's Estimate.	Total Receipts.	Amount Available.
		Drachms.	Drachms.	Drachms.	Drachms.
DIRECT TAXES.					
1	Ploughing animals (representing land tax)	2,700,000	2,016,000	2,168,543	2,016,000
3	Oil	1,101,000	1,117,600	960,136	1,101,000
4	Wine	2,400,000	2,021,000	1,809,171	2,400,000
5	Currants. Tax on export (representing land tax)	4,006,440	4,282,000	4,054,396	4,006,440
8	Ionian Islands. Export duties on agricultural produce	2,600,725	1,780,000	1,955,478	2,600,725
9	Tax on cattle	2,041,000	2,323,000	2,232,086	2,041,000
10	License tax on trades and professions	3,450,000	1,952,000	2,330,215	3,450,000
11	House tax	2,610,000	2,000,000	2,225,635	2,610,000
12	Tax on net profits of joint stock companies and mines	430,000	378,000	298,741	430,000
2, 6, 7	Sundries	733,630	687,000	745,221	733,630
	Total	23,577,795	18,025,600	18,578,612	23,577,795
DUTIES AND EXCISE ON ARTICLES OF CONSUMPTION.					
1	Customs duties on imports	25,921,000	26,122,000	26,758,170	25,921,000
2	Excise on tobacco	3,728,295	4,223,000	4,295,416	3,728,295
3	„ spirits	350,000	188,000	222,371	350,000
	Total	29,999,295	30,533,000	31,275,957	29,999,295
STAMPS AND DUES.					
1	Stamps	10,365,500	10,953,000	11,110,931	10,365,500
2	Consular fees	560,000	486,000	503,023	560,000
3	Post	1,545,000	1,509,400	1,549,176	1,545,000
4	Telegraphs	1,400,000	1,380,800	1,401,894	1,400,000
10	Exemption from military service	1,098,000		1,832,960	1,098,000
5-9, 11	Fines and sundries	2,277,710	3,640,400	2,027,350	2,277,710
	Total	17,246,210	17,975,600	18,425,987	17,246,210
MONOPOLIES.					
1	Cigarette paper	1,595,000	1,570,000	1,681,630	1,595,000
2	Playing cards	280,000	327,000	326,145	280,000
3	Matches	900,000	923,000	931,384	900,000
4	Petroleum	5,500,000	5,295,000	5,344,115	5,500,000
5	Salt	2,447,500	2,450,000	2,503,970	2,447,500
	Total	10,722,500	10,565,000	10,787,244	10,722,500
REVENUE FROM STATE PROPERTY.					
1, 2	Real property	467,594	424,000	447,248	467,594
3-6	Royalties on mines, public establishments, &c.	1,219,027	517,000	853,742	1,219,027
7	Forests	1,168,700	1,617,000	1,681,298	1,168,700
8	Fisheries	475,000	485,000	480,200	475,000
	Total	3,330,321	3,043,000	3,442,488	3,330,321
1-12	Sale of sundry State property	1,120,000	1,470,000	1,200,416	1,120,000
SUNDRY REPAYMENTS AND DEDUCTIONS FROM BUDGETARY EXPENDITURE.					
1	Repayment of advances	200,702	200,000	180,000	200,702
2	Pension fund (retention)	1,000,000	915,000	880,000	1,000,000
3-5	Miscellaneous (chiefly)	678,110	510,000	80,000	678,110
	Total	1,878,812	1,625,000	1,060,000	1,878,812
SUNDRY RECEIPTS AND PAYMENTS.					
	Occasional and sundries	3,000,870	3,000,000	3,078,376	3,000,870
	Payments on account of	4,000,000	3,000,000	3,000,000	4,000,000
	Total	7,000,870	6,000,000	6,078,376	7,000,870
	Lighthouse dues	400,000	400,000	390,713	400,000
REVENUE OF AGENCIES FOR PRIMARY EDUCATION.					
1	.. .. .	1,000,000	.. .. .	1,000,000	1,000,000
2-4	.. .. .	200,000	.. .. .	200,000	200,000
	Total	1,200,000	.. .. .	1,200,000	1,200,000
	Grand Total	50,000,000	48,000,000	48,000,000	50,000,000
	.. .. .	1,000,000	1,000,000	1,000,000	1,000,000

TABLE II.—ESTIMATED REVENUE FOR 1933, AND RECEIPTS FOR FIRST 12 MONTHS OF FINANCIAL YEAR.

		1932-33	1933-34	1932-33	1933-34	Percentage	Percentage
		Estimated	Estimated	Actual	Actual	1932-33	1933-34
DIRECT TAXES.							
	Ploughing animals (representing land tax)	1,075,000	2,100,000	1,075,000	1,960,000	100	182,336
	Oil	1,000,000	1,000,000	1,000,000	970,000	100	97,000
	Wine	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
	Currents. Tax on export (representing land tax)	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
	Ionian Islands. Export duties on	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
	House tax	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
	Tax on net profits of joint stock companies and mines	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
2, 6, 7	Sundries	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
	Total	10,075,000	10,100,000	10,075,000	10,075,000	100	10,075,000
DUTIES AND EXCISE ON ARTICLES OF CONSUMPTION.							
	Customs duties on imports	20,000,000	20,000,000	20,000,000	20,000,000	100	20,000,000
1	Excise on tobacco	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
2	“ spirits	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
3	“ wine	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
4	Total	26,000,000	26,000,000	26,000,000	26,000,000	100	26,000,000
STAMPS AND DUES.							
	Stamps	12,000,000	12,000,000	12,000,000	12,000,000	100	12,000,000
	Consular fees	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
	Post	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
	Telegraphs	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
	Exemption from military service	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
10	Anchorage dues	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
12	Fines and sundries	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
5-9, 11, 13	Total	26,000,000	26,000,000	26,000,000	26,000,000	100	26,000,000
MONOPOLIES.							
	Cigarette paper	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
1	Playing cards	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
2	Matches	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
3	Petroleum	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
4	Salt	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
5	Total	10,000,000	10,000,000	10,000,000	10,000,000	100	10,000,000
REVENUE FROM STATE PROPERTY.							
	Land	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
1	Buildings	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
2	Other	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
3	Total	6,000,000	6,000,000	6,000,000	6,000,000	100	6,000,000
4-13	Sale of sundry State property	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
SUNDRY REPAYMENTS AND DEDUCTIONS FROM BUDGETARY EXPENDITURE.							
	Repayment of advances	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
1	Pension fund (retention from salaries)	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
2-7	Miscellaneous (chiefly matters of)	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
	Total	6,000,000	6,000,000	6,000,000	6,000,000	100	6,000,000
SUNDRY RECEIPTS AND PAYMENTS.							
	Receipts	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
	Payments	2,000,000	2,000,000	2,000,000	2,000,000	100	2,000,000
	Total	4,000,000	4,000,000	4,000,000	4,000,000	100	4,000,000
GRAND TOTAL.							
	Total	68,075,000	68,100,000	68,075,000	68,075,000	100	68,075,000

Rate of Exchange.

The fluctuations of the exchange during 1893 and 1894 will be seen in Table XIII. Starting in January, 1893, at 1 dr. 54 l., the highest point hitherto reached, it gradually fell to 1 dr. 38 l. in the beginning of April, during the progress of M. Tricoupi's loan negotiations, and rose suddenly on their abrupt termination in May to 1 dr. 63 l. It was maintained at about that point during the summer, until at the beginning of October the diminution in the usual remittances on account of currants, and the growing conviction of the necessity of supplementing the funding loan by a further arrangement, sent it up to 1 dr. 81 l. M. Tricoupi's return to office, and the announcement of his measures for curtailing the gold coupon, sent it down successively to 1 dr. 66 l. and 1 dr. 57 l., but it soon afterwards rose again, and has remained for three months between 1 dr. 69 l. and 1 dr. 71 l., until the recent appearance in the market of the Government as a buyer of gold for the June coupon sent it up again to 1 dr. 73½ l.

Exports and Imports.

Tables XIV and XV show the principal articles of importation and exportation during 1893. They are taken from the official statistics, but are of little use, as the values given are based on rates fixed some years ago, and no account is taken of changes of price that have taken place, notably in wheat and currants. The greatest proportional falling-off in imports has, unfortunately, been in tissues and iron goods, in which British trade is most largely interested.

Table III.—ESTIMATED Revenue for 1894.

Classification.	Description.	Official Estimate.	Revised Estimate.
	DIRECT TAXES.	Drachmæ	Drachmæ
1	Ploughing animals (representing land tax) ...	2,133,000	2,500,000
3	Oil ...	900,000	800,000
4	Wine ...	1,448,000	2,000,000
5	Currants. Tax on export (representing land tax) ...	4,008,000	4,000,000
8	Ionian Islands. Export duties on agricultural produce...	2,440,000	2,100,000
9	Tax on cattle ...	2,000,000	2,300,000
10	License tax on trades and professions ...	1,300,000	1,300,000
11	House tax ...	1,000,000	1,000,000
12	Tax on net profits of joint-stock companies and mines ...	200,000	200,000
2, 6, 7	Sundries ...	700,000	700,000
	Total ...	18,236,000	18,200,000
	DUTIES AND EXCISE ON ARTICLES OF CONSUMPTION.		
1	Customs duties on imports ...	18,000,000	22,500,000
2	Excise on tobacco ...	5,500,000	5,500,000
3	" spirits ...	60,000	60,000
4	" wine sold by retail... ..	300,000	300,000
	Total ...	24,218,400	28,960,000
	STAMPS AND DUES.		
1	Stamps ...	12,477,067	12,500,000
2	Consular fees ...	500,000	500,000
3	Post ...	1,500,000	1,500,000
4	Telegraphs ...	1,300,000	1,400,000
10	Exemption from military service ...	1,000,000	1,000,000
12	Anchorage dues ...	420,172	400,000
4-9, 11, 13	Fines and sundries ...	1,708,500	1,700,000
	Total ...	19,723,739	19,700,000
	MONOPOLIES.		
1	Cigarette paper ...	2,400,000	2,400,000
2	Playing cards ...	300,000	300,000
3	Matches ...	925,000	900,000
4	Petroleum ...	5,200,000	5,150,000
5	Salt ...	2,200,000	2,100,000
	Total ...	11,025,000	10,850,000
	REVENUE FROM STATE PROPERTY.		
1, 2	Real property ...	480,531	480,000
3-6, 9	Royalties on mines, public establishments, &c. ...	1,500,000	1,100,000
7	Forests ...	1,300,000	1,500,000
9	Fisheries ...	478,800	450,000
	Total ...	3,759,331	3,530,000
1-13	Sale of sundry State property ...	1,320,119	1,320,000
	SUNDRY REPAYMENTS AND DEDUCTIONS FROM UNORDINARY EXPENDITURE.		
1	Repayment of advances ...	37,915	30,000
2	Pension fund (retention from salaries) ...	900,000	700,000
3-8	Miscellaneous (chiefly matters of account)... ..	237,000	200,000
	Total ...	1,174,915	930,000
	SUNDRY RECEIPTS AND ARREARS.		
	Occasional and sundries ...	2,170,000	2,170,000
	Payments on account of former financial years ...	3,720,000	3,720,000
	Total ...	5,890,000	5,890,000
	Lighthouse dues ..	400,000	400,000
	RECEIPTS ON ACCOUNT OF PRIMARY EDUCATION.		
1	Communal contributions ...	1,800,000	2,100,000
3-4	Other receipts ...	181,200	100,000
	Total ...	1,981,200	2,200,000
	Communal contributions for police ...	1,200,000	1,200,000
	Grand total ...	80,544,664	92,120,000

Table IV.—ARREARS of Revenue and Collection on Account of Arrears during the Year 1892.

Classification of Revenue.	Arrears.	Collected.
	Drachmæ.	Drachmæ.
Tax on cattle	619,099	..
Wine tax	513,268	..
Ploughing animals	467,818	..
House tax	602,288	..
License tax.. .. .	1,461,390	..
Domains	2,122,491	..
Remaining classes of revenue ..	3,608,639	..
Total	9,394,993	3,608,639

Table V.—REVENUE from Customs Duties on Imports during the Years 1892-93.

Monthe.	Revenue from Duty on Wheat.			Revenue from all other Customs Duties.		
	1892.	1893.	Difference in 1893.	1892.	1893.	Difference in 1893.
	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.
January	157,868	300,138	+ 142,270	1,405,424	1,133,736	- 271,688
February	416,537	420,489	+ 3,952	1,703,652	1,313,491	- 388,161
March	237,340	476,979	+ 239,639	1,735,821	1,591,898	- 143,923
April	100,731	523,343	+ 422,612	1,326,839	1,693,729	+ 366,890
May	187,582	433,062	+ 245,480	1,445,213	1,153,003	- 292,210
June	210,252	544,461	+ 334,209	1,563,763	1,252,441	- 311,322
Total for first 6 months	1,319,310	2,698,563	+ 1,379,253	9,120,552	8,062,198	- 1,058,354
July	198,184	300,186	+ 102,002	1,840,443	1,463,845	- 376,598
August	198,885	260,753	+ 60,868	2,030,744	1,447,730	- 583,014
September	302,599	216,588	- 86,011	2,461,676	1,694,808	- 766,868
October	615,390	188,380	- 427,010	2,368,983	1,662,675	- 706,308
November	750,992	206,655	- 544,337	2,581,581	1,766,710	- 814,871
December	385,565	494,213	+ 108,648	2,358,683	1,660,018	- 698,665
Total for second 6 months	2,491,576	1,765,775	- 725,801	13,832,110	9,761,186	- 4,070,924
Grand total	3,800,886	4,464,338	+ 663,452	22,952,762	17,823,384	- 5,129,378

Table VI.—EXPENDITURE, 1892.

Classification.	Budgetary Estimated Expenditure.	Extra- Budgetary Credits.	Total Actual Expenditure for Account of Financial Year.	Unexpended Credits.
	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.
ORDINARY EXPENDITURE.				
Public Debt	33,516,566	3,112,325	35,739,876	889,015
Allowances	130,399	..	112,585	17,814
Pensions	4,911,156	..	4,611,427	299,729
Civil List (Royal Family)	1,325,000	..	1,325,000	..
Legislative Body ..	774,113	..	756,867	17,246
Department of—				
Foreign Affairs ..	2,135,135	115,639	2,010,857	239,916
Justice	4,833,534	570,000	5,080,813	322,721
Interior	7,482,958	70,009	6,686,541	866,426
Public Worship and Instruction	4,888,088	113,020	4,407,039	594,069
War	16,638,375	105,000	15,199,918	1,543,457
Marine	6,445,653	195	5,274,758	1,171,090
Finance	5,045,690	12,000	4,900,458	157,232
Administration, &c., of revenue	8,139,463	509,875	7,931,157	718,181
Sundry payments ..	3,720,000	294,018	3,303,551	710,467
Total	99,986,129	4,902,081	97,340,847	7,547,363
EXTRAORDINARY EXPENDITURE.				
Department of—				
Interior*	..	11,664,895	9,938,757	1,726,138
Finance†	..	400,000	400,000	..
Total	..	12,064,895	10,338,757	1,726,138
Grand total ..	99,986,129	16,966,976	107,679,604	9,273,501
	116,953,105		..	..

* For railways.

† Towards redemption of fractional notes loan.

Table VII.—EXPENDITURE for Financial Year 1893, up to the End of February, 1894.

Classification	Budgetary Estimated Expenditure	Extra- Budgetary Credits	Total Credits	Actual Expenditure to End of February, 1894
	Drachmæ	Drachmæ	Drachmæ	Drachmæ
ORDINARY EXPENDITURE.				
Public Debt	35,468,596	}	44,317,635	11,152,368
Available for financial operations	8,849,039			
Allowances	135,594			
Pensions	1,893,000			
Civil List	1,325,000	204,507	5,097,597	3,518,661
Legislative Body ..	504,258	..	1,325,000	1,325,000
Department of—			504,258	488,144
Foreign Affairs ..	1,917,368	166,829	2,084,197	1,572,915
Justice	4,695,764	450,000	5,145,764	4,595,810
Interior	8,939,996	1,917,099	10,856,195	7,722,170
Worship and Instruc- tion	7,397,990	..	7,397,990	5,887,986
War	14,582,466	1,041,500	15,623,966	13,066,692
Marine	5,154,874	206,000	5,360,864	4,219,800
Finance	1,869,526	11,059	1,880,585	1,611,031
Administration, collec- tion, &c., of revenue	8,106,368	873,713	8,980,081	5,571,611
Sundry payments ..	1,863,000	45,000	1,908,000	754,638
Total	105,701,939	4,915,797	110,617,736	61,592,408
Orders for payment outstanding	..	..	..	3,086,280
Total	..	..	..	64,678,688
EXTRAORDINARY EXPENDITURE.				
Department of—				
Interior*	..	7,930,123	7,930,123	3,440,659
Finance	..	201,719	201,719	..
Total	..	8,131,842	8,131,842	3,440,659
Grand total	105,701,939	13,047,639	118,749,578	68,119,347

* For railways.

Table VIII.—ESTIMATED Expenditure, 1894.

Classification.	Budgetary Estimated Expenditure.
	Drachmæ.
Public Debt	21,999,083
Allowances	144,094
Pensions	5,126,400
Civil List (the King and Crown Prince) ..	1,325,000
Legislative Body	496,561
Department of Foreign Affairs	2,001,522
" Justice	5,393,564
" Interior	10,209,689
" Public Worship and In- struction	7,359,521
Department of War	14,761,946
" Marine	5,303,611
" Finance	2,456,556
Administration, collection, &c., of revenue	8,902,661
Sundry payments	2,213,000
Total	87,693,158

Table IX.—GENERAL Results of Revenue and Expenditure during the Years 1882-92.

Financial Year.	Receipts from all Sources.	Expenditure of all Kinds.	Surpluses.	Deficits.
	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.
1882	58,379,495	63,997,766	...	5,118,270
1883	58,537,556	67,795,869	...	9,258,313
1884	107,419,633	91,346,784	16,072,854	...
1885	61,427,085	122,797,767	...	61,370,732
1886	95,567,967	129,717,525	...	34,149,558
1887	176,210,226	107,128,254	69,081,972	...
1888	93,671,217	108,050,859	...	14,379,641
1889	183,031,964	168,739,262	14,292,702	...
1890	123,155,325	141,465,394	...	18,310,070
1891	106,346,415	122,831,022	...	16,484,607
1892	105,992,360	107,676,604	...	1,747,245
Total	1,170,176,198	1,231,547,106	99,447,628	160,818,436

NOTE.—Aggregate deficit during the years 1882-92, 61,370,908 dr.

GREECE.

Table X.—DISTINGUISHING Receipts from Loans and from other Sources, and Expenditure for Redemption of Debt and for other Purposes during the Years 1882-92.

1	2	3	4	5	6	7
Financial Year.	Receipts from Loans.	Expenditure for Redemption of Debt.	Surplus of Loans.	Receipts from other Sources.	Expenditure for other Purposes.	Deficiency between Columns 5 and 6.
1882	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.
1883	..	..	..	58,879,495	63,997,765	5,118,270
1884	..	..	..	58,537,556	67,795,869	9,258,313
1885	..	599,000	46,175,001	60,741,637	90,846,784	30,105,147
1886	..	..	316,902	61,110,133	122,797,757	61,687,624
1887	..	..	32,461,496	63,163,471	129,717,325	66,553,854
1888	..	..	77,468,774	82,849,896	91,236,607	8,386,801
1889	..	15,891,617	77,468,774	80,551,395	101,459,859	14,898,464
1890	..	3,693,000	31,255,940	83,731,591	10,667,189	16,943,299
1891	..	68,964,433	27,660,549	79,931,795	125,902,414	46,970,619
1892	..	15,562,080	15,898,359	90,272,212	122,625,178	32,352,966
	..	205,814	10,599,890	91,929,470	107,276,604	12,347,134
	..	400,000	..	..	..	..
Total	..	104,224,904	242,309,733	823,641,561	1,127,322,202	303,880,641

NOTE.—Aggregate deficiency between columns 4 and 7, 61,870,908 dr.

Table XI.—SHOWING all Sinking Fund and Consolidated Loans Contracted since the Establishment of the Kingdom; the Amounts Repaid; and the Amounts Outstanding on May 31, 1893.

Date of Issue.	Description of Loan.	Nominal Capital, in New Drachmæ.	Issue Price.	Effective Capital, in New Drachmæ.	Interest, Per Cent.	Sinking Fund.	Amounts Repaid up to May 31, 1893.			Capital Outstanding on May 31, 1893.		Remarks.
							By Sinking Fund.	By Later Loans.	Total.	In Paper Currency.	In Gold.	
1836	Bavarian Loan	4,159,094	...	4,159,094	...	...	1,494,642	2,664,452	4,159,094	...	...	
1838	Advances of the three Powers	100,392,834	...	100,392,834	...	...	27,971,822	...	27,971,822	...	72,421,012	
1847	Eynard Loan	500,000	...	500,000	...	...	500,000	...	500,000	...	...	
1863	Loan of 6,000,000 old drachmæ	5,340,000	100	5,340,000	{ 6, and prizes 1 }	1%	2,694,475	2,610,886	5,305,379	34,621	...	
1863	Loan on guarantee of emery revenue	892,857	100	892,857	8	...	892,857	...	892,857	...	...	
1866-68	Loans	2,678,507	100	2,678,507	8	{ 1866 Loan, 2% 1868 Loan, 10% }	1,139,031	1,539,476	2,678,507	...	...	
1867	Loan of 25,000,000 fr.	25,000,000	80	20,000,000	8 and 9	1%	11,786,500	13,183,766	24,971,000	29,000	...	
1868	Compensation for King Otho's property... ..	4,005,000	100	4,005,000	...	...	1,639,237	...	1,639,237	2,365,763	...	
1869	Loan of 9,000,000 fr.	9,000,000	100	9,000,000	9½	{ 18 half-yearly in- stalments }	3,688,000	5,312,000	9,000,000	...	...	
1871	" 4,000,000 fr.	4,000,000	90	3,600,000	8	1%	1,186,250	2,810,000	3,996,500	3,500	...	
1874	" 26,000,000 fr.	26,000,000	81	23,587,200	6	0·50%	2,790,000	2,911,378	5,701,500	20,298,500	...	Has been consolidated, with interest at 5%
1876-77	" 10,000,000 fr.	10,000,000	79	7,900,000	6	0·50%	648,500	8,435,313	9,034,250	915,750	...	Of the amount outstanding, 886,250 drachmæ have been consolidated, the balance remaining in circulation
1877	Loan for construction of steam revenue cutters	285,714	100	285,714	8	{ 7 half-yearly in- stalments }	285,714	...	285,714	...	...	
1878	Recognition of loans of 1824-25	24,975,000	100	24,975,000	5	0·25%	9,438,750	15,536,250	24,975,000	...	...	
1879	Loan of 60,000,000 fr.	60,000,000	78½	45,368,471	6	0·65%	4,805,000	55,122,087	59,928,000	...	72,000	
1880	" 120,000,000 fr.	120,000,000	70½ and 1½	81,264,614	5	0·80%	14,780,000	...	14,780,000	...	105,220,000	
1882	Road-making loan { nominal capital ... 16,934,187 capitalised interest 807,989 }	17,742,176	100	16,934,187	6½	1%	...	15,983,319	15,983,319	1,758,857	...	{ Consolidated, with interest at 6%, and interest afterwards reduced to 5%, by agreement with National Bank
1884	Loan of 170,000,000 fr.	101,620,000	{ Average 65·60½ }	66,353,759	5	0·80%	9,659,000	...	9,659,000	...	91,961,000	Was restricted, in 1887, to 100,000,000
1885	" 9,000,000 fr.	9,000,000	100	9,000,000	7	0·25%	100,000	...	100,000	8,900,000	...	Has been consolidated, with interest at 6%
1885	Patriotic Loan	2,723,860	10	2,709,886	...	{ Annual drawings during 77 years }	215,020	...	215,020	2,508,840	...	
1886	Fractional Notes (forced currency)	18,000,000	100	18,000,004	1	...	...	4,000,000	4,000,000	14,000,000	...	
1887	Loan of 15,000,000 fr.	15,000,000	66·60	9,990,000	4	0·80%	165,000	...	165,000	14,835,000	...	
1887	" 135,000,000 fr.	135,000,000	67·40	90,990,000	4	0·80%	1,600,000	...	1,600,000	...	133,400,000	
1889	" 1,200,000l.	30,000,000	68½	20,437,500	4	...	...	...	...	...	30,000,000	Consolidated
1889	" 5,000,000l.	125,000,000	72½	91,103,527	4	...	...	...	...	...	125,000,000	"
1889	Myli-Kalamata Railway Loan	24,000,000	100	19,264,671	6	...	...	24,000,000	24,000,000	...	...	{ Redeemed by means of loan of 5,000,000l.
1889	Missolonghi-Agrinion Railway Loan	2,000,000	100	1,787,885	6	...	...	2,000,000	2,000,000	...	...	
1890	Piræus-Larissa Railway Loan	60,000,000	89 and 86	52,950,000	5	...	65,500	...	65,500	...	59,934,500	
1892	Loan of 16,500,000 fr.	16,500,000	66·66	10,999,890	4	During 25 years	395,000	...	395,000	...	16,105,000	
1893	Funding loan of 100,000,000 fr.	11,449,954	...	11,449,954	5	0·50%	...	...	...	...	11,449,954	
Total		985,261,996	...	755,920,553	...	...	97,940,298	156,108,927	254,051,699*	65,649,831	645,563,466	...
											711,213,297	

* Including 2,474 drachmæ retained in the Treasury on account of unclaimed dividends:—

Drachmæ.
97,940,298
156,108,927
2,474
254,051,699

Table XII.—SHOWING Provision made for Service of Debt during the Years 1893-94.

Date of Loan.	Description of Loan.	Capital Outstanding, March 31, 1894.	Interest Per Cent.	Interest.		Sinking Fund.						Remarks.
				Credit Voted for 1893.	Normal Requirements of 1894.	Credit Voted for 1894.		Credit Voted for 1893.	Normal Requirements of 1894.	Credit Voted for 1894.		
						Gold.	Paper.			Gold.	Paper.	
		Drachmæ.		Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.	Drachmæ.	
PERMANENT DEBT IN GOLD.												
1889	Consolidated Loan of 1,200,000L	30,000,000	4	1,200,000	1,200,000	360,000	..	..	..	..	..	Provision made for payment of interest to the extent of 30 per cent. only of the normal amount; and sinking funds, when existing, suspended
1889	" " 5,000,000L	125,000,000	4	5,000,000	5,000,000	1,500,000	..	..	..	..	..	
1880	Sinking Fund Loan of 120,000,000 dr. ..	104,370,000	5	5,239,750	5,218,500	1,565,550	..	1,720,000	1,720,000	..	..	
1884	" " 170,000,000 dr. ..	91,350,000	5	1,583,750	4,567,500	1,370,250	..	1,440,000	1,440,000	..	..	
1887	" " 135,000,000 dr. ..	133,045,000	4	5,325,400	5,321,800	1,596,540	..	370,000	370,000	..	..	
1890	Piræus-Larissa Railway Loan	59,907,500	5	2,995,887	2,995,375	898,612	..	41,500	41,500	..	..	Converted into a paper loan, Dec., 1893
1893	Funding Loan of 100,000,000 fr. ..	11,500,000	5	..	575,000	172,500	..	..	..	..	..	
1892	Sinking Fund Loan of 16,500,000 dr. ..	..	..	648,200	631,950	..	..	402,500	417,500	..	..	
1883	Loan guaranteed by the three Powers ..	71,521,012	..	..	..	..	..	900,000	900,000	900,000	..	
	Total	626,693,512	..	24,992,987	25,510,125	7,463,452	..	4,874,000	4,889,000	900,000	..	
PERMANENT DEBT IN PAPER.												
1874	Consolidated balance of loan of 26,000,000 dr. ..	20,303,500	5	1,015,175	1,015,175	..	1,015,175	..	..	..	..	Sinking fund suspended
1876	" " 10,000,000 dr. ..	886,250	5	44,313	44,313	..	44,313	..	..	..	..	
1880	" " 9,000,000 dr. ..	8,900,000	5½	489,500	489,500	..	489,500	..	..	..	..	
1878	" " road-making loan ..	1,758,857	5½	96,737	96,737	..	96,737	..	..	..	..	
1885	Patriotic Loan, annual prizes and drawings ..	2,508,840	..	9,080	9,080	..	9,080	36,280	36,280	..	36,280	
1887	Sinking Fund Loan of 15,000,000 dr. ..	14,795,000	4	593,000	591,800	..	591,800	40,000	40,000	..	..	Contracted in gold, but converted into a paper loan, Dec., 1893
1892	" " 16,500,000 fr. ..	15,402,000	4	..	..	..	631,950	..	..	..	417,500	
1868	Debt to King Otho's heirs.. ..	2,365,763	4	94,148	89,855	..	89,855	106,102	110,395	..	110,395	
	Total	67,420,210	..	2,341,953	2,336,460	..	2,968,410	182,382	186,675	..	564,175	
FORCED CURRENCY DEBT.												
	Loan in gold.. ..	16,800,000	1	800,000 {	..	168,000	..	..	..	..	..	This loan appears in Table XI among the Permanent Debt
	Loan in bank notes.. ..	74,000,000	1		..	..	740,000	..	..	..	..	
	Fractional Currency Loan ..	14,000,000	1		..	..	140,000	..	..	..	..	
	Exchequer Bills	14,000,000	5		..	..	700,000	..	..	..	..	
	Total	118,800,000	..	1,490,000	..	168,000	1,580,000	..	..	..	..	
FLOATING DEBT IN GOLD.												
	Provisional loan of 5,989,450 fr. (originally 5,815,000 fr.)	5,989,450	6	..	..	359,367	..	..	..	..	..	Including commission at ¼ per cent. per quarter
	Provisional loan of 40,000L	1,000,000	5½	..	..	67,500	..	..	..	..	..	
	" " 700,000 fr.	700,000	6	..	..	42,000	..	..	..	..	..	
	" " 703,733 fr.	703,733	6	..	..	42,224	..	..	..	..	..	
	Provisional loan of 66,558L 12s. (originally 64,620L)	1,663,965	6	..	..	99,838	..	..	..	..	..	Including commission at ½ per cent. per half year
	Provisional loan of 62,166L 8s. (originally 60,000L)	1,573,587	5	..	..	78,679	..	..	..	..	..	
	Provisional loan of 35,000L	875,000	5½	..	..	59,063	..	..	..	..	..	
	" " 66,160L (originally 64,000L)	1,654,000	5½	..	..	111,645	..	..	..	..	..	
	Total	14,159,735	..	927,274	..	860,816	..	..	..	..	..	
	Sundry charges	..	..	660,000	..	41,000	514,000	..	..	..	..	Calculated at 1·70 dr. to 1 fr. on 9,913,900 fr., the amount of the credits originally demanded, although the gold credits actually voted are only 9,432,768 fr.
	Special credit for financial operations, 1893 ..	..	..	8,849,039	..	..	..	..	..	..	..	
	Estimated loss by exchange, 1894.. ..	..	..	..	..	..	6,939,730	..	..	..	..	
RECAPITULATION.												
	Permanent Debt in gold	626,693,512	..	24,992,987	25,510,125	7,463,452	..	4,874,000	4,889,000	900,000	..	
	" " paper	67,420,210	..	2,341,953	2,336,060	..	2,968,410	182,382	186,675	..	564,175	
	Forced Currency Debt	118,800,000	..	1,490,000	..	168,000	1,580,000	..	..	..	..	
	Floating Debt in gold	14,159,735	..	927,274	..	860,816	..	..	..	..	..	
	Sundry charges	..	..	660,000	..	41,000	514,000	..	..	..	..	
	Special credit for financial operations, 1893 ..	..	..	8,849,039	..	..	..	..	..	..	..	
	Estimated loss by exchange, 1894.. ..	..	..	..	..	..	6,939,730	..	..	..	..	
	Total	827,073,157	..	39,261,253	..	8,532,768	12,002,140	5,056,382	..	900,000	564,175	
						20,535,908				1,464,175		
	Total charge for debt	..	..	44,317,635	..	21,999,083	..	..	..	..	..	

NOTE.—The discrepancy between Tables XI and XII as to the amount of capital outstanding is owing mainly to Table XI showing the loan of 16,500,000 dr. among the Gold Debt, Table XII among the Paper Debt; Table XI showing the Fractional Currency Loan of 14,000,000 dr. among the Permanent Paper Debt, Table XII among the Forced Currency Debt. Further, the two tables refer to the state of the debt at different times.

Table XIII.—RATE of Exchange for Francs, Gold.

Date.					1893.	1894.
					Dr. l.	Dr. l.
January	1	..	..	..	1 54	1 67½
"	15	..	..	..	1 54½	1 67½
February	1	..	..	..	1 57½	1 69½
"	15	..	..	..	1 52½	1 69½
March	1	..	..	..	1 46½	1 71
"	15	..	..	..	1 47½	1 71½
April	1	..	..	..	1 38½	1 71½
"	15	..	..	..	1 42	1 71½
May	1	..	..	..	1 43½	1 73½
"	15	..	..	..	1 63	..
June	1	..	..	..	1 63	..
"	15	..	..	..	1 55	..
July	1	..	..	..	1 61	..
"	15	..	..	..	1 59½	..
August	1	..	..	..	1 67	..
"	15	..	..	..	1 63½	..
September	1	..	..	..	1 69	..
"	15	..	..	..	1 77	..
October	1	..	..	..	1 81½	..
"	15	..	..	..	1 76	..
November	1	..	..	..	1 73½	..
"	15	..	..	..	1 66½	..
December	1	..	..	..	1 57	..
"	15	..	..	..	1 61	..

Table XIV.—IMPORTS into Greece, 1893.

Articles.		Quantity.	Value.
			£
Live stock	Head.. ..	81,708	115,837
Hides	Cwts... ..	56,908	148,612
Fish, fresh or prepared, caviar, &c.	"	97,265	161,968
Wheat and meslin	Bushels ..	3,677,954	932,060
Coffee, chicory, &c.	Cwts... ..	20,954	92,197
Wood and timber for building	Cub. metres ..	51,595	138,300
Coal	Tons	187,053	299,285
Raw metals	"	7,440	74,990
Sugar	Cwts... ..	112,054	116,536
Cotton tissues	"	25,614	214,527
Woollen and hair tissues ..	"	9,040	161,441
Common iron goods and hardware	"	51,838	76,790
Sundries.. .. .	"	..	1,126,854
Total .. .. .	.. ..	..	3,659,397

NOTE.—Values calculated at the rate of 25 dr. to the l.

Table XV.—EXPORTS from Greece, 1893.

Articles.				Quantity.	Value
					£
Silk and cocoons	..	..	Cwts...	3,264	55,847
Sponges	..	..	..	2,863	91,625
Currants	..	..	Tons ..	138,460	1,850,986
Feet, fresh and dry	..	..	Cwts...	262,520	107,445
Tobacco	..	..	..	51,952	98,426
Olive oil	..	..	..	74,300	107,000
Olives	..	..	..	24,210	17,430
Vascones	..	..	Tons ..	5,657	45,260
Soap	..	..	Cwts...	15,814	21,500
Tanned hides	..	..	..	2,031	21,573
Ores	..	..	Tons ..	153,818	600,165
Emery	..	..	..	1,000	18,757
Wine in cask	..	..	Gallons ..	4,194,265	167,770
Sundries	..	..	..	..	317,930
Total	..	..	..	..	3,521,354

NOTE.—Values calculated at the rate of 25 dr. to the £1.

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N^o. 1348.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

HONDURAS.

REPORT ON THE

TRADE, &c., OF AMAPALA.

*Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1894.*

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HONDURAS.

AMAPALA.

Mr. J. Rössner to the Earl of Rosebery.

My Lord,

Amapala, February 9, 1894.

I HAVE the honour to report a very unsatisfactory commercial year throughout this Republic, and a future with no promises of a better condition of trade.

In 1883, Don Luis Bogran became President of this Republic, and immediately inaugurated an era of commercial prosperity that continued until the latter part of his second term of office in 1890. Retrospective.

President Bogran espoused the cause of foreign immigration and embraced every possible opportunity of inducing foreign capitalists to aid him in the regeneration of his country. To ask for an exclusive concession of any description whatever was to receive it without any drawback or cavil, and the result of this liberal policy was that great mining and other enterprises sprang up on every hand. Immigration.

The amount of duties paid to the Government on imported goods during the fiscal year of 1883 at the Amapala customs-house was 262,045 dol. 82 c.; the same for fiscal year 1890 was 487,544 dol. 98 c. Duties.

This shows an increase in duties actually paid upon foreign merchandise of 225,499 dol. 16 c., and is a solid justification of President Bogran's foreign policy, and policy regarding foreign enterprises.

No statistics are available regarding the value, class of goods, or country of origin, during the period mentioned; nor do the figures give even an approximate idea of the value of merchandise imported, for I am assured by the customs officials that during the whole of President Bogran's administration at least 30 per cent. of the importation came into the country, duty free, under the concessions mentioned, and consequently are not included in the foregoing figures. No statistics.

The only published statistical data that I have found available regarding the imports and exports via the customs-house of Amapala that may serve for comparison are embraced in the following tables:— Imports and exports

TABLE showing the Value of Exports and Imports to and from the Undermentioned Countries during the Year 1888-89.

Country.	Value.	
	Exports.	Imports.
	Dollars.	Dollars.
United States	1,623,621	562,003
England	51,872	337,008
France	29,428	89,000
Germany	48,629	51,708
Other countries	..	18,279
Total	1,753,550	1,060,128

TABLE showing the Value of Exports and Imports to and from the Undermentioned Countries during the Year 1889-90.

Country.	Value.	
	Exports.	Imports.
	Dollars.	Dollars.
United States	608,304	337,289
England	17,520	217,040
Germany	61,061	111,474
France	7,815	133,664
Other countries	..	93,778
Total	694,700	893,245

If the commercial axiom of "he who buys less from his neighbour than he sells him becomes richer at such neighbour's expense" be true, then the foregoing tables clearly show that England is rapidly increasing her wealth at the expense of Honduras, while the United States, with a balance of trade greatly against them, are furnishing Honduras with the power to make good the deficit with England, but the question arises: Why should the United States be able to control so large a difference in the exports and imports of this Republic?

While it is true that American manufacturers have succeeded in attracting the attention of Honduran purchasers to certain kinds of American cotton goods, such as drills, sheetings, calicos, &c., on account of weight, fastness of colours or styles of design, the trade they have taken from our home producers has affected them to a very unappreciable extent, and in the line of general merchandise English products are as eagerly sought after as ever in former years, but it is in the machinery and general iron-mongery line that the American manufacturers are making the greatest inroads.

A major part of the importations accredited to the United States in the foregoing tables consisted in mining machinery, steam boilers and engines, pumps, saw mills and wood-working machinery, and, of course, the greater number of mining enterprises in the country being in the hands of Americans, it is to be expected they should have a preference for American machinery, but what is surprising is the fact that English and French mining companies here have, after erecting English machinery, abandoned it and purchased complete or partial American "outfits."

I am assured that price has in no wise entered into consideration in such changes, and that adaptability to the work required, and economy in the performance of the same after erection are the prime, and, in fact, the only factors. Price no object.

Is it possible our manufacturers cannot make mining machinery that will compete to advantage with like machinery made in the United States? I cannot bring myself to believe such to be the case, but when I see steamer after steamer, month after month unloading tons upon tons of American machinery at this port I cannot help believing that there is a business deficiency somewhere on the part of our manufacturers that should be looked into, and remedied as quickly as possible. The same is beginning to be the case regarding edged tools. In former years Honduran artisans were content with almost any kind of an axe, saw, plane, or former chisel, providing the price was sufficiently low to please them, but they now begin to demand a better class of tools, and seek quality regardless of price. American edged tools appear to be prominent as regards quality and temper, but Germany is bidding for a share of trade in this line with a stubbornness that bids fair to be successful, while our own manufacturers seem to be content to manufacture what gave them good results in the distant past, forgetting that others with less facilities are striving continually to improve, and are surely forging to the front in lines of fabrics until recently exclusively English.

During the last 6 years trade between this port and Germany has increased more than 75 per cent., owing to the fact that two German steamship lines have been established between this coast and Hamburg via the Straits of Magellan. German trade.

At first it was believed such a line would prove a losing speculation, but practical results established by the "Kosmos" line, the first to venture, were such as to warrant the establishment of another line, the "Kirsten," from the same country, and to day we have both lines doing each a paying carrying trade, to say nothing of commerce diverted from other countries to German markets. These lines together send out to this coast about 15 large steamers per year, and they so time their voyages as to go back loaded with coffee or other produce. As these steamers offer freight rates lower, and deliver goods direct from wharfs in Hamburg to wharfs in Central American ports, without the expense and breakage of transshipment at the Isthmus of Panama, much merchandise formerly ordered only from England is now bought in Germany.

Iron
crookery, and
match trades.

The English iron, crockery, and match trades, and in fact English manufactures of all descriptions of small cost, that pay high freights, are those that suffer most by these steamers, and when it is considered that if the increase of German trade at this port is 75 per cent. for the past 6 years, a like or greater increase may be credited to the remaining nine ports north of Panama, to say nothing about South American Pacific ports, it leads one to believe a similar enterprise might be established on a paying basis from Manchester, now that the canal is finished, or Liverpool, that would go far toward protecting many English industries from the encroachments of German energy and enterprise.

A suggestion.

If such an enterprise should not meet with favour from English shipowners or merchants, it might be possible to induce the German steamers mentioned to stop at English ports and there receive cargo direct for our merchants here.

I have, &c.

(Signed) J. RÖSSNER.

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1894.
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DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

ITALY.

REPORT FOR THE YEARS 1892-93
ON THE
TRADE OF GENOA AND DISTRICT.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1025.

Presented to both Houses of Parliament by Command of Her Majesty.
MAY, 1894.

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ITALY.

GENOA.

Consul Payton to the Earl of Kimberley.

My Lord,

Genoa, March 30, 1894.

I HAVE the honour to transmit herewith my General Commercial Report and Tables of Statistics for the years 1892-93, regretting that, owing to the lateness of my arrival at this post last year, and the great difficulty of collecting accurate statistics of the large trade of the port, I was unable to furnish the 1892 Report in suitable time for publication in last year's series.

I have, &c.

(Signed) CHAS. A. PAYTON.

Report on the Trade and Commerce of Genoa for the Years 1892-93.

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WEIGHTS AND MEASURES.

The value of the *l.* has varied from 26 lire to 39 lire during 1893. It is in this (Spezia) report calculated at the value of 28 lire. The ton is reckoned at 1,000 kilos.; the kilo. at 2·20 lbs.; the hectolitre at 22 gallons the metre at 39 inches.

Shipping and Navigation.

The maritime returns for the year 1892 which I have extracted from a report kindly furnished to me by the Genoa Chamber of Commerce, show a diminution from the previous year of 390 ships, the total of all entrances and clearances being 11,619 vessels, giving the aggregate of 6,623,408 tons.

In spite of the considerable coasting trade, the total tonnage of steamers was more than nine times that of sailing ships.

As in previous years, more than half the vessels belonged to the Italian flag, Great Britain coming next, then France, Germany, the Netherlands, and other countries. But, if we deduct the coasting trade, which occupies some four-fifths of the Italian tonnage, we find that, in international traffic, the British flag has the preponderance over all.

The naval construction in the district was but slack, only 22 ships, of the aggregate of 8,534 tons, being built, chiefly at the yards of Sestri Ponente.

The total of sea-faring people registered in the district amounted to 26,220 men, divided into two categories, the first comprising actual sea-going men, from masters of vessels down to deep-sea fishermen, 15,989, and the second naval engineers, ship-builders, caulkers, coasting fishermen, boatmen, pilots, and workmen in iron shipbuilding, 10,231.

Coal-freights during 1892 fluctuated considerably, Cardiff to Genoa being from 5s. 9d. to 9s. 3d., and freights from the Tyne 5s. 3d. to 8s. 10½d.

The following are the quotations for 1893:—

From—	Average Rate of Freight.
	<i>s. d.</i>
Cardiff to Genoa	7 1½
„ Savona	7 3½
Newcastle to Genoa	6 1½
„ Savona	6 3½

Cardiff freights last year averaged from about 6s. to a little over 8s., Newcastle, 5s. 4d. to 7s. 3d.

There is occasional freight, zinc ore for sailing vessels, Genoa to Swansea, the usual rate being 7s. per ton, while copper ore is shipped from Sestri Levante, also for Swansea, the steam freight being 12s. to 13s.

The Italo-American Exhibition held here in 1892, in commemoration of the Fourth Centenary of Christopher Columbus, was the occasion of the visit of a portion of our Mediterranean Squadron, under the command of the late Admiral Sir George Tryon, in connection with whose name it is gratifying to remark that, on receipt of the news of the great loss which England sustained in the disaster to H.M.S. "Victoria" in June, 1893, a subscription, (1729)

Genoese
contributing.

subscription which I inaugurated here, as a contribution to the Lord Mayor's Fund for the relief of sufferers and survivors, was well responded to, not only by British subjects, but by many Genoese, who thus gave a pleasing and substantial proof of their friendly sentiments toward the British Fleet. The sum collected was 2,209 lire.

Large
Italian lines.

The principal Italian lines of steamers trading between Genoa and America are the "Navegazione Generale Italiana" (Florio and Rubattino) and "La Veloce." According to published figures, the receipts of the former company in 1892 amounted to 41,633,486 lire, or 1,665,339*l.*, and the total expenses to 39,148,054 lire, or 1,665,339*l.*, showing a net profit of 113,817*l.*, being an improvement on 1891, to which the increased activity due to the Columbian Exhibition no doubt contributed.

The "Veloce" line is said to have concluded the year 1892 with an income of 460,133*l.*, and a clear profit of 31,415*l.*, allowing a 5 per cent. dividend to shareholders, in addition to contributions to reserve funds, and proportions allowed for administration and working expenses.

The value of the fleet of this company was increased by important repairs and additions to the steamers "Nord America" "Duchessa di Genova," "Duca di Galliera," "Vittoria," "Montevideo," and "Napoli."

New dry
docks.

Two excellent dry docks were completed in 1892, and a temporary wooden landing stage, at the Grazie quay, was repaired and lengthened, affording greater convenience for goods and passengers.

Hydraulic
works and
cranes.

In the western part of the harbour and at the head of the New Mole hydraulic works were completed, and four hydraulic cranes were erected on Ponte Biaggio, besides other work for the benefit of shipping, including dredging for the deepening of water at anchorage.

List of foreign
vessels.

In addition to the Italian, English, French, and German lines, the port was visited in 1892 by the following:—

Nationality.						Number of Vessels.
Greek	..	..	..	..	..	103
Norwegian	..	..	..	..	..	77
Dutch	..	..	..	..	..	75
Austrian	..	..	..	..	..	43
Spanish	..	..	..	..	..	36
Danish	..	..	..	..	..	31
Belgian	..	..	..	..	..	11
Swedish	..	..	..	..	..	10
Russian	..	..	..	..	..	10
Turkish	..	..	..	..	..	5
American	..	..	..	..	..	3
Chilian	..	..	..	..	..	1
Samiote	..	..	..	..	..	1

Principal
English lines.

Among the principal English lines sending steamers to this

port I may mention the Cunard line, whose steamers arrive from Liverpool, and proceed to other ports of Italy and the Mediterranean; the General Steam Navigation Company whose boats from London make somewhat similar voyages; the Peninsular and Oriental Company, with sailings from Genoa to Alexandria; the Anchor Line, Glasgow to Genoa, other Italian ports and the United States; the Z line, sending a few steamers to Genoa and other ports in Italy and the Mediterranean; the Wilson Line steamers from Hull to Genoa; the Prince Line, England to Genoa, other Italian ports, &c.; and other steamers working from London to Genoa and Leghorn, and back, calling at Genoa, to London.

With reference to the two principal German lines whose fine steamers visit this port, I quote the following from the "Standard," of January 23, 1894:—"The two great German Steamship Companies, the North German Lloyd, and the Hamburg-American Steam Packet Company have combined to effect a joint fast service between New York and Genoa. The line was started by the North German Lloyd in October, 1891, simply as a temporary winter route for American travellers to and from the Riviera.

"It obtained much support, and was made permanent throughout the year.

"The Hamburg-American Company subsequently placed steamers on the same route, and now the companies have combined as regards this service, and are announcing the regular weekly sailings of some of their finest steamers, such as the "Fürst Bismarck," "Spree," and "Kaiser Wilhelm II," between New York and the Mediterranean. The ports called at are, Genoa, Naples, Gibraltar, and Algiers, and non-transatlantic passengers can make the round of those places, starting at any one of them. At Genoa and Naples connection is made with the Imperial lines of the North German Lloyd for Egypt, China, and Australia, and through tickets for trips round the Mediterranean are issued in connection with the Austrian Lloyd. Touring in the Mediterranean in the liners which hitherto have been seen only on the North Atlantic route is a novelty which will probably increase the traffic on these waters."

From personal experience I can speak highly of the fine accommodation, general comfort, and excellent fare to be found on the North German Lloyd boats.

The statistics of shipping for 1893 show a total of 11,746 vessels, adding entrances and clearances together, or a diminution from 1892 of 170. German lines to America, &c.

Taking entrances alone, we find the proportion of Italian vessels increasing, there being 4,019, including 2,656 sailing craft, out of the total of 5,846, but the larger proportion of these would be small coasters, for their aggregate register tonnage is given as 1,446,587, while that of 982 British vessels was 1,236,454 tons. Italian vessels, increased number.

Next in importance comes Germany, with 173 vessels of 351,452 tons, then Austria with 169 vessels, of 136,999 tons; Holland, 133,917 tons; France, 101,354 tons; Greece, 97,681 tons; Other countries. British ships and tonnage.

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the other nationalities being in much the same proportion as in 1892, and again one Samiote vessel and one Chilian are included in the list.

Satisfactory augmentation. It is satisfactory to note that there was an increase of 78 in number, and 169,025 in tonnage, of British vessels entered; the table of clearances also shows an augmentation in British tonnage of 157,160 tons.

Vaccination of sailors. In the case of vessels proceeding from this port to the United States, a new regulation came into force, under an American law of February 4, 1893, that all seamen on vessels proceeding to the United States were to be examined by an American Medical Officer, and, if they could not prove vaccination to his satisfaction, they must be vaccinated. I was informed that a bill of health would be refused by the United States Consul or Medical Officer to any vessel not complying with this regulation, which, under such circumstances, would run the risk of detention and expense on arriving at an American port.

This measure was the cause of considerable annoyance to masters of vessels, not only in the worry of the inspection, and in the expense incurred for the vaccination of men in whose cases it was deemed necessary, but also in the fact that many of the crew would absolutely refuse to be vaccinated, or re-vaccinated, as the case might be, and some were even discharged in consequence of such refusal.

Disinfection of bedding and clothing. During the prevalence of cholera in some parts of Europe, the mode of disinfection of sailors' bedding and clothing, practised here by the officials of the port, was the subject of several remonstrances from masters of vessels, one grievance being that the bedding and clothing, after disinfection, were returned in such a saturated condition that the recipients had contracted chills and colds in consequence, and another that many articles had been lost on the way back, betwixt shore and ship. On the former point, the reply of the local authority was, that the wetting of the articles in the process of disinfection was unavoidable, and must be regarded as a trifling inconvenience compared with the importance of the security of health.

And, with regard to losses in transit, the bedding and clothing were taken back by their owners, who were often careless in consequence of intoxication.

Tonnage measurements of British steamers. By order of the Italian Minister of Marine, a new regulation came into force on September 1, 1893, with reference to tonnage measurements of British ships in Italian ports, according to which the spaces allowed to be excluded from the tonnage, for the purpose of payment of anchorage and port dues, namely, double bottom, spaces for accommodation of crew and of deck-passengers, and of steering gear, &c., could not be allowed exemption in Italian ports (although Italian ships get the benefit of such reductions in England).

Double bottom, &c., not allowed.

British ships visiting Italian ports were to be provided with certificates showing their net measurement according to Italian rules, and to pay port dues accordingly.

Those not possessing such certificates were to be measured, to enable the port authorities to verify the space to be added to the net tonnage, measurers to be paid at the rate of 9 c. per ton of the newly-measured spaces, with a minimum retribution of 5 fr. Measurement and fees for same.

A further circular to harbour-masters recommended that Suez Canal certificates, when forthcoming, be taken as the basis for the tonnage to be added for space occupied by double bottom, otherwise such space might be calculated at 5 per cent. of the total tonnage, "according to the system adopted by the European Commission of the Danube." Suez Canal certificates.

Considerable trouble has been caused in the carrying out of these regulations, and, should they remain in force, it seems urgently necessary that masters of British steamers coming to Italian ports should be warned that, to avoid trouble and expense, they should be provided with certificates showing what their tonnage would be according to Italian rules of measurement.

The frequency with which British seamen, when on shore here, get into the hands of the Italian police, for drunkenness or disorderly conduct, and sometimes for slight or unintentional contraventions of local regulations, committed through ignorance, is a source of constant trouble to masters of vessels and to this consulate, especially as a man arrested is often kept many days in the lock-up before being charged (and possibly acquitted), and may serve a short term of imprisonment and not be actually released until several days after its expiration, in each case missing his ship and being thrown upon the hands of the consulate and the Board of Trade. British sailors and Italian police.

Several petty offenders have recently been expelled from the kingdom, and sent to Marseilles by the authorities at the expiration of their sentences. Deportation of petty offenders.

The "Seamen's Institute," Church of England, a branch of the Gibraltar Mission to Seamen, and the "Sailor's Rest," working under the Scotch Presbyterian Church, are excellent institutions, providing rest, recreation, various reading, and wholesome fare for "Jack ashore," with frequent concerts and other entertainments, but they are conducted on total abstinence principles, and, while we all recognise and deplore the evils of excess, it would surely be as Quixotic as hopeless a task to endeavour to make all sailors (or any other class of men) teetotallers, and I cannot help thinking that a fairly practical remedy against the evil temptations, adulterated liquors, frequent extortions, and often trumped-up charges, which characterise their treatment at many of the liquor-shops in the neighbourhood of the docks, would be the providing of respectable accommodation and sound liquor under the control of one of the above-mentioned institutions, or some other responsible supervision. Missions to seamen.

According to information in a local commercial paper, the coral fisheries in 1892 appear to have been kept within rather narrow limits, and the Italian boats refrained from fishing operations in distant seas. Coral fisheries; 1892.

At the towns and villages of Santa Margherita Ligure, Santa Places sending boats.

Scenes of operations.	Teresa Gallura, Carloforte, Alghero, and Torre del Greco—of which only the first-named, Santa Margherita, is in this district—some 50 boats were equipped for carrying on the coral fishery along the coasts of Sardinia, and, from information collected, it would appear that they confined their explorations principally to the upper part of the Gulf of Alghero, the neighbourhood of Carloforte, and the northern coast of Sardinia from Cape Testa to Isola Rossa, gathering altogether about 2,460 kilos. of coral of good quality, without including the inferior kind known as “terragno.”
Small results.	The total value of the coral collected being reported to amount to about 5,455 <i>l.</i> , and the expenses of fitting-out and working to 4,975 <i>l.</i> , it is evident that only an insignificant profit remained to the owners of the boats.
Exportation.	A considerable contrast to the above meagre totals is found in the export list, showing for 1892 39,815 lbs. of coral shipped, valued at 113,632 <i>l.</i> , and in 1893 the increased quantity of 44,061 lbs., value 125,720 <i>l.</i> , proving that a large quantity of coral from other sources than the above-mentioned finds its way to the great northern port.

General Commerce.

Exports and imports, 1892-93.	According to the figures which I have been able to obtain from the Chamber of Commerce and the custom-house, the trade of 1893 amounted to 14,935,692 <i>l.</i> in imports, and 4,735,006 <i>l.</i> in exports, being an augmentation of 312,510 <i>l.</i> in imports, and 681,400 <i>l.</i> in exports, over the figures of the previous year.
Increase.	Although in the report for 1891 we find the importation estimated at 17,403,233 <i>l.</i> , I attribute the apparent great falling-off not so much to actual decrease of general importation as to a difference in the price of cotton, and I observe that, while the consular report gives 4,184,829 <i>l.</i> as the value of 69,747 tons of raw cotton, the Chamber of Commerce puts down the much smaller value of 2,789,940 <i>l.</i> for the same quantity, and the latter sum seems to correspond with the prices of cotton for the last three years, which I obtained from another source.
Comparison with 1891.	England's share in the total appears still satisfactory. Of the imports we contributed, in 1892, 1,560,247 tons out of 2,273,479 tons, coal being, of course, the principal item, while of the exports England took nearly an eighth in weight, though not so large a proportion in value, having but an insignificant share in the most costly item, silk and its manufactures, taken principally by North and South America, France, Switzerland, and Northern Africa.
England's share. Coal.	Also, from the colonial point of view, we must remark that of 109,035 tons in imports and 2,289 tons in exports, ascribed in the statistical tables to Asia, a considerable proportion is due to British India, while in the African totals, though largely referable to Tunis and Tripoli, the Cape Colony has some share.
Silk.	Russia in 1892 contributed some 217,051 tons of the imports, America coming next with 156,760 tons.
British colonies. ¹	The remaining proportion of the trade was divided between
Russia.	
Other foreign countries	

France, Germany, Belgium, Austria, Turkey, Sweden and Norway, Holland, Switzerland, Spain, Portugal, Greece, Denmark, and Malta, as will be seen by Annex C, with reference to which I must remark that it is impossible to obtain either the exact values due to each country for 1892 and 1893, or the tonnage proportions for the latter year, without such an amount of work as would undesirably delay the publication of this report.

With reference to England's main item in the importation, *Importation of coal.* coal, the custom-house returns give 1,476,699 tons in 1892, and 1,438,456 tons in 1893, while a trade circular gives the relative amounts as 1,490,816 tons for 1893, and 1,299,328 tons for 1892. I prefer to rely on the Chamber of Commerce figures, which tally, for 1892, with those of the custom-house, the return for 1893 (Chamber of Commerce) being not yet available. The major part of the coal comes from Cardiff, Newcastle ranking next, while small quantities appear as coming from Liverpool, Grimsby, and Hull.

Exports.

The main features in the export lists, which, according to the *Increased best information I am able to procure, show a total for 1893 of exportation.* 4,735,006*l.*, being an increase in value of 681,400*l.* over that of 1892, are, firstly, a considerable augmentation in the exportation *Sundries.* of minor articles, which causes the large amount of 1,822,103*l.* to appear in sundries; and secondly, a diminution of no less than 740,292*l.* in the value of silk exported. *Silk.*

There is also a falling-off in wine, both in the wood and in *Wine.* bottles and flasks, but the quantity is still considerable, the total value for 1893 being 375,340*l.*

Butter and cheese show increase respectively of 13,004*l.* and *Butter and cheese.* 22,057*l.* over the figures of 1892.

In coral 44,061 lbs. weight, rough and worked, are estimated at *Coral.* 125,750*l.*, being 12,118*l.* more than in 1892.

Dried fruits appear to be worth 10,480*l.*, for 411 tons in each *Fruits* year.

Furniture shows an increase of 10,108*l.*

An important item in the sundries is that of hats, principally *Furniture.* of felt, of which 296 tons, valued at 47,484*l.*, appear to have been *Hats.* shipped in 1892, mainly to Uruguay, the Argentine Republic, Peru, and Brazil, while an enormous increase is shown for 1893, the figure of 980 tons (nearly) being given in the custom-house returns of exports.

The exportation of hemp amounted to 34,452*l.*, an increase of *Hemp.* 17,800*l.* over 1892.

Hides also showed improvement, likewise marble, marble *Hides, marble and statues, &c.* statuary.

Very noticeable is the largely increased exportation of matches, *Matches.* the value of which in 1893 was 40,467*l.*, against 23,455*l.* in 1892.

Minerals show a considerable decrease, also olive oil. *Minerals.*

The exportation of sulphur, valued at 11,745*l.* in 1893, was *Olive oil.* more than double that of 1892. *Sulphur.*

Woodware. There was a considerable increase in the value of wood-ware,
 Woollen also of woollen tissues, the latter pointing to increased activity in
 tissues. the Italian cloth industry.

Imports.

Chemicals. A further inspection of the import lists shows an increase in chemical products of nearly 8,000*l.*, while in the small but valuable article of cocoons there is a decrease, and also in coffee, but a considerable increase in the section of "copper, brass, and bronze," probably referable to a quantity of bronze money coined in Birmingham for the Italian Government.

Cocoons.

Copper, brass, and bronze.

Coinage.

Grain. Of grains other than wheat, the 1893 importation amounted to a little over half that of 1892, the values being respectively 85,928*l.* and 161,688*l.*

Guano. There was a marked augmentation in guano, of which 12,571 tons, in 1893, are valued at 50,295*l.*, and an increase of 8,330*l.* in the value of mineral oils.

Mineral oils.

Seeds. Seeds of various kinds, including the oleaginous ones, of castor-oil, linseed, colza, rape, sesame, and ground-nuts, gave, in 1893, the respectable total of 654,043*l.*

Vegetable fibres. Vegetable fibres, including hemp, flax, and jute, were largely imported, the value for 1893 being 185,559*l.* against only 77,948*l.* in 1892.

Tobacco. There was a slight falling off in the importation (Government) of tobacco, the value of which appears as 186,003*l.* for 1893 against 208,260*l.* in 1892.

Wheat. The importation of wheat increased considerably, the 1893 value being 2,083,425*l.*, the second largest item on the import list, cotton coming first and coal third.

Woollen goods. There was a considerable decrease in the importation of woollen manufactures, referable to increased development of native industry in cloth, &c.

Timber. Imported timber showed a marked augmentation.

British Share in Trade.

British share in trade. Looking over the somewhat voluminous statistics obtained from the custom house of all articles of importation and exportation, which are classed in sixteen categories, with many minute subdivisions, we find, in Category I, spirits, drinkables, and oils. Great Britain sending, in 1892, mineral waters, wine, beer (6,162 bottles), spirits (3,979 bottles, and 712,888 gallons in casks), ether and chloroform, cotton and fish oils (77 tons and 111 tons respectively), 352 tons of other oils, 474 tons of heavy oils and turpentine, altogether a total in this category of 4,307 tons out of 24,314 tons.

Spirits, wine, oil, &c.

Colonial produce. In Category II, we find England sending, in 1892, 5,398 tons of coffee out of the total importation of 7,205 tons (in 1893 it was

5,364 tons out of 6,494 tons), nearly the whole of the cocoa, all the cinnamon, cloves, pepper, and tea, making a total, in the colonial produce class, of 11,256 tons, to which may be added 3,310 tons from India, out of 75,345 tons.

In Category III, chemical products, &c., Great Britain contributed in 1892 the whole of the arsenic and boric acids, nearly the whole of the sulphuric, all the carbolic, nearly the whole of "other acids," all the potash and caustic soda, 395 tons out of 470 tons in oxides, a large share in carbonates, chloride of lime and sulphate of alumina, the whole of the sulphate of copper, most of "sundry chemicals," 31 tons out of 54 tons of quinine bark, half the made-up medicines, 329 tons out of 508 tons of common soap, totalling about a third of the whole importation under this category. Chemical products, &c., 1892.

In 1893 England sent 194 tons out of 600 tons of acids, and a large share again in potash, soda, oxides, chlorides, carbonates, sulphates, bark (of which the importation was considerably increased), and more than half the common soap.

Hitherto there has been a considerable demand for English patent and other medicines, a variety of which have been kept in stock by the leading chemists, but I am informed that by a recent regulation, all compounded medicines sold in Italy must bear, outside the package, a recipe showing the ingredients of which they are composed; if this be strictly enforced it will materially interfere with the trade in English medicaments, and will probably prove absolutely prohibitive in the case of patent medicines. Medicines. New regulation respecting.

In Class IV, dye and tan stuffs, including gambier and indigo, England's share in 1892 amounted to 2,522 tons out of 12,506 tons, but a good deal more came from British possessions (India). In 1893 out of 11,230 tons of vegetable dye stuffs, England contributed 493 tons, and India 2,607 tons.

In Class V, hemp, jute, and other vegetable fibres, England, including British possessions, sent in 1892 nearly all the jute, and had, including India, a total of 4,332 tons out of 5,094 tons in this category. In 1893 there was a notable increase in the importation of vegetable fibres, the amount being 11,573 tons, against 4,883 tons in 1892. Of the former figure, British possessions in Asia contributed 9,982 tons, while the share of England herself appears to have been small, and included in "other countries," Africa giving 651 tons, and France 163 tons. Vegetable fibres.

Category VI, cotton and its manufactures, is so minutely subdivided, as to cotton tissues, into small classes of measure and weight, according to number of yards to the lb., number of elementary threads, and other infinitesimal details, as to cause some wonder how custom-house operations, with reference to the immense number of different classifications found in a tariff-book of 28 pages devoted to cotton alone, can ever be performed with accuracy. Cotton.

Of 75,064 tons imported in 1892 of raw and manufactured cottons, England sent 3,869 tons, and British possessions 24,348 tons of raw cotton, while of the remainder the United States contributed 23,491 tons; Central America, 11,509 tons; Egypt,

896 tons; France, 813 tons; and Turkey, Belgium, Greece, Germany, Switzerland, and Austria smaller quantities. Adding cotton prints, 272 tons out of 355 tons, and a share in other manufactures, we have 28,480 tons in this section.

1893.

In 1893 the share of England and her possessions appears to have been 20,358 tons out of a total of 72,436 tons. Taking raw cotton alone, we find in bales 148,849 from North America, 92,853 from India, 30,171 from Egypt, 8,557 from England, 4,706 from the continent, 1,106 from the Levant, and 1,726 from other countries.

Wool: 1892.

In Category VII, wool, England shows a small share in raw wool, only 25 tons out of 2,832 tons, most of which came from the Argentine Republic, but a fair proportion in woollen tissues, the whole of the felts, 46 tons and 11 tons out of 14 tons of carpets, England's share being 307 tons of the 4,388 tons in this section, in which America leads and France comes next.

1893.
Woollen
tissues.

In 1893, in raw wool and yarns, Great Britain sent nearly one-tenth of the total of 2,221 tons, America and France leading as before, while England contributed 113 of the 242 tons of woollen tissues.

English
cloth and
Italian
imitations.

I find that English fashions, both in cloth and cut, are much appreciated by the Genoese public, and am informed by a leading firm in the tailoring trade, that the importation of English cloths, increasing in 1893, promised a further augmentation in 1894, while importation from Germany was also on the increase, but the consumption of French goods diminishing. In Italy the manufacture of cloth continues to increase, and to make strong competition with English stuffs, many of which are copied so closely that even a close observer may be deceived; and these cloths of native manufacture cost about 15 per cent. less in production, and pay no customs duty, and little carriage. Some wholesale dealers make up parcels of foreign cloths mixed with a considerable proportion, perhaps one-third, of native manufacture, the whole being sold as foreign.

Silk.

In Class VIII, silk, the British share in 1892, is, as might be expected, insignificant, about 1 ton in 1,150 tons, of which Asia (including Turkey, China, and Japan), contributed 537 tons; France, 403 tons; European Turkey, 199 tons; and Africa (Tunis) a little.

Wood.

In 1893 England's contribution was even smaller.

Category IX comprises wood in various forms, and here we find in 1892, according to the Chamber of Commerce Report, British possessions in Asia sending all the firewood, 105½ tons, and England 146 tons out of 32,689 tons of rough timber, which came principally from America, Austria, and France. In rough furniture, England sent 17 tons out of 22 tons, and in utensils and general woodware, 29 tons out of 60 tons.

Of 612 tons of canes, reeds, and osiers, 377 tons came from Algeria and Tunis, 76 tons from England, and 119 tons from British India, raising England's share of the 35,123 tons in the wood section to 618 tons.

In Category X, paper and materials for paper-making, England's ^{Paper and} proportion for 1892 appeared only 38 tons out of 281 tons, including ^{paper-making} 17 tons out of 48 tons of wall-paper. 117 tons of wood-pulp came ^{materials.} from Sweden and Norway.

In 1893 Great Britain took a larger share in the item of writing and wrapping paper, 19 tons out of 42 tons, against 7 tons in 31 tons for the previous year.

Category XI comprises hides, skins, and all leather work, and here England has but a small share, only sending, in 1892, 517 tons ^{Hides, skins, and leather work.} of raw hides out of 5,046 tons, of which total nearly half was contributed by the Argentine Republic, British possessions in Asia contributing 811 tons, the remainder coming from France, United States, Brazil, China, South Africa, Germany, and Belgium. In 1893 England only sent 370 tons of hides out of a larger quantity than that of the previous year.

The next category, metals, is an interesting one, in which we ^{Metals.} are not surprised to find Great Britain taking the lead, contributing, including a little from British India, 63,352 tons out of the total, in 1892, of 102,923 tons.

In old and scrap-iron England sent 30,930 tons, and British India 1,216 tons, out of the total of 56,824 tons. In cast-iron 16,578 tons out of 20,163 tons; pig-iron and steel, 2,514 tons, out of 3,832 tons; iron and steel plates, 2,739 tons out of 2,833 tons; plates overlaid with zinc or pewter, 3,588 tons out of 3,594 tons; zinc plates, 350 tons out of 543 tons; engines and parts of engines, 2,536 tons out of 3,000 tons. Lead came principally from Spain.

In 1893 we find England still sending most of the scrap-iron, but a smaller proportion of the cast-iron; in iron and steel plates, bars, &c., 7,484 tons out of 9,016 tons; plates overlaid with zinc or pewter, the whole of the importation, 1,672 tons; engines and parts of engines, 2,722 tons out of the total of 3,311 tons.

In Section XIII, stones, earths, earthenware, glassware, &c., ^{Non-metallic minerals.} Great Britain appears to have furnished in 1892, the whole of the ^{Bricks and tiles.} bricks and tiles imported, amounting to 3,312 tons, and of the 1,476,699 tons of coal imported, 1,431,003 came from Great ^{Coal, 1892.} Britain, while France sent 17,809 tons, and Belgium 13,984 tons.

Australia occasionally sends coal to this port, a rich bituminous ^{Coal from Australia.} coal, similar to our "bog-head" or cannel. It is used for mixing with and enriching other coal in the manufacture of gas, &c.

A curious item also was marble, worked, 12 tons from Australia.

In earthenware, Great Britain contributed, in 1892, about one- ^{Earthenware.} third of the import; in window-glass, 104 tons out of 310 tons. Our total in this category was 1,445,717 tons out of 1,504,436 tons.

In 1893 we find a slight diminution in the coal trade, the ^{Coal, 1893.} amount from Great Britain being 1,422,084 tons out of 1,438,456 tons, France and Belgium sending the rest. We also notice 1,004 tons of China clay; bricks and tiles, 4,660 tons out of 4,695 tons; "other earths and non-metallic minerals," 8,747 tons out of 20,274 tons.

Category XIV comprises cereals, flour, and vegetable products ^{Cereals, &c.} not otherwise classified. In the 1892 tables we find wheat, from ^{Wheat, 1892.}

Russia, 192,385 tons; Turkey, 22,799 tons; British possessions in Asia, 21,129 tons; United States, 17,860 tons; Argentine Republic, 9,216 tons; Egypt, 179 tons.

Maize. Maize, 16,973 tons, came from America (North and South), Russia, Turkey, and Egypt.

Starch. England sent a good proportion of the starch, both fine and common.

Linseed. Of 16,928 tons of linseed, 14,247 tons appear as coming from British India, and 593 tons from Asiatic Turkey.

Palm and cocoanut-oil. In palm-oil and cocoa-nut oil, out of 2,990 tons, 1,598 tons came by way of England, and 1,267 tons from France.

Including British possessions in Asia, Great Britain has a very satisfactory share in this category also.

Wheat, 1893. In 1893 the importation of wheat from Russia appears to have increased from 192,385 tons to 277,286 tons, while British possessions in Asia show a considerable falling-off.

Animals and animal products. Category XV comprises animals and animal products, and the first important item in 1892 is that of 457 oxen and bulls, all from Turkey, then a considerable quantity of poultry from Russia.

Meat extracts. Extract of meat, to the weight of nearly 5 tons, came from England, with the exception of a little from the United States. Of fish, dried and smoked, the consumption is always considerable, and we find Great Britain sending 2,847 tons in the total of 7,951 tons, while 3,783 tons came from Sweden and Norway, and the rest from Denmark, France, Germany, and the United States.

Sardines and anchovies. Sardines and anchovies, which are largely caught in this district, came in a preserved state, mostly from Spain, though some 360 tons out 3,121 tons appear as coming from England.

Caviare. A curious item is 906 kilos, or nearly a ton, of caviare, put down as coming from the United States, but I find that "other fish roe" is included under this denomination, so it was probably not the roe of the sterlet or sturgeon.

Fats. Sundry fats, to the amount of 11,168 tons, of which England only contributed 1,548 tons, came mostly from the Argentine Republic and United States.

Manure. In manure, Great Britain sent 5,647 tons out of 8,966 tons, and 2,372 tons came from the Argentine Republic.

Including British India, Great Britain's share in the "animal" category for 1892 was 11,361 tons in 40,721 tons.

Fish, 1893. In 1893 the importation of preserved fish amounted to 13,701 tons, of which 3,587 tons came from Great Britain, the rest mostly from Sweden, Norway, and Spain. England had this year a larger proportion in sundry fats, and, of stearic acid, sent 1,179 tons out of 1,887 tons.

Manure, 1893. In manure Great Britain sent 5,802 tons out of the increased total of 12,571 tons.

Indiarubber, gutta-percha, &c. In Category XVI, "sundries," there is nothing very noticeable, except that England contributed, in 1892, 112 tons of indiarubber and gutta-percha, out of a total of 166 tons, the rest coming from the United States. England's total out of the small weight of 270 tons in this category was 134 tons, composed of indiarubber

and gutta-percha, haberdashery, and hats. It is noticeable that hats and clothing of English make and style are increasingly worn by the Genoese.

At the English Stores, much frequented not only by British residents and visitors but by the Genoese, I am informed that among articles in greatest demand are oatmeal, jams, biscuits, mustard, sauces, and pickles, cloth and other woollen goods, hosiery, and tea. English goods in chief demand.

Manufacturers and shippers when sending goods abroad, especially for the development of new markets, should be specially careful to send their best samples, not, as I hear is sometimes the case, inferior articles or goods which have been so long in stock as to have deteriorated in quality. Best samples should be sent.

In laying special stress on the predilection shown by the Genoese for English goods and fashions, I must mention another instance of policy as short sighted as the above, in the fact that some English firms send out for sale as of English manufacture, packages of goods a proportion of which bear the well-known designation "made in Germany." Goods "made in Germany."

English goods for Genoa should be genuine and guaranteed English.

The export returns are much less voluminous.

In Category I in 1892, we find England taking 34,013 bottles of wine out of 2,806,383 bottles, most of which went to South America; in olive oil 750 tons out of 7,310 tons, the rest going to North and South America, France, Germany, &c. Export statistics. Wine.

England's total in this section is 1,300 tons out of 34,207 tons.

In 1893 Great Britain took an increased quantity of wine, 50,361 bottles out of 2,614,611 bottles, but apparently only 79 tons of olive oil against the 750 tons of the previous year.

In Category II the only noticeable item is that of "sundry spices," of which England took 109 tons out of 224 tons in 1892, and 58 tons out of 117 tons in 1893.

In Category III, the return of 1892 shows England receiving 13 tons of tartar (bitartrate of potash), and sundry drugs to the weight of 220 tons out of 508 tons. Chemicals.

In 1893, nearly the whole of the 8½ tons of boric acid went to Great Britain.

The exportation of Italian matches in 1893 increased to 679 tons from 393 tons in 1892, they went mainly to Tunis and Tripoli, America North and South, France, and Austria; only small quantities, not separated in the table, to England. Matches.

In the small Category IV, paints and dye-stuffs, there is no exportation to England. Paints and dye-stuffs.

Category V, is that of vegetable fibres, in which in 1892, England received 73 tons out of 406 tons of raw fibres, a little in rope, and tissues of hemp and flax, totalling in this category 140 tons out of 3,209 tons. Vegetable fibres.

In 1893, England received 22 tons of hemp of a total of 957 tons. Hemp.

In Category VI, cotton is an item in which we hardly expect to (1729) Cotton. B

see England among the countries receiving from Italy, but 693 tons of raw cotton appear as sent from Genoa in 1892, with a small quantity of coloured cotton goods amounting to nearly another ton.

Wool. In Category VII, wool, there is hardly anything worth mentioning, except that England took in 1892 of rough wool 28 tons of a total of 34 tons, while in 1893 the amount was 124 tons out of 150 tons, showing an interesting increase in this department.

Silk. In Category VIII, silk shows little of importance to England; 548 tons of raw silk were distributed in 1892 between France, America, India, Asiatic Turkey, Egypt, Tunis, and Algeria, and sundry silk goods went chiefly to France.

Paper and wood. In Classes IX and X, paper and paper-making materials, and wood and wood-work respectively, England's share is also insignificant.

Skins and leather. In Category XI, skins, raw and manufactured, show England taking in 1892, 58 tons of raw hides out of 162 tons, while in 1893 the exportation appears to have doubled, England taking 127 tons out of 355 tons.

Gloves. Gloves are extensively manufactured here, and are good and reasonable in price, in 1892 some 27,000 pair are noted as going to the United States, while the exportation of 1893 seems to have considerably diminished, but went mostly to America.

Metals and minerals. In Class XII, metals, England took in 1892 the whole of the zinc ore, 5,540 tons, and in 1893, 6,187 tons, nearly all the Genoa shipments, from mines in the Lake District, owned by the "Crown Selter Company" of South Wales.

In 1892 England also took a little copper ore, tinware, and 53,768 kilos. of silver, totalling in the metal category 5,670 tons out of 10,943 tons.

Non-metallic minerals. In Category XIII, Great Britain took, in 1892, a fair share in building stone, sundry earths and clays, graphite and earthenware, altogether 4,092 tons out of 11,883 tons. In 1893 a little marble and alabaster, and 1,590 tons of clays, chalks, &c., out of a total of 5,227 tons.

There is a considerable exportation of sulphur, which goes to America, Germany, Switzerland, Turkey, &c.

Cereals, &c. In Category XIV, cereals and vegetable products, England took in 1892, including sundry grain, chestnuts, rice, flour, maccaroni, pickles, and oil-cake, 1,446 tons out of 31,587 tons.

Animal products. In Class XV, animal products, England took a little in salt and smoked meat, anchovies, and sardines, cheese, glue, sponge, coral, and horn and bone ware. In 1893, butter, 44 tons, is a new item of exportation to England, while cheese is a little more than in 1892, but only amounts to a little over a ton.

Sundries. In Class XVI, in 1892, England took a little in haberdashery and indiarubber goods, and 1,299 kilos. of curiosities out of 9,900 kilos., totalling in this section 117 tons out of 967 tons.

In concluding the commercial section of this report, I must repeat with reference to it and to the appended statistical tables that I cannot guarantee the accuracy of the figures, as I find that

those obtained from official and private sources nearly always fail to correspond, but in taking as a basis of my estimates information procured for 1892 from the Chamber of Commerce and the custom-house, and for 1893 from the latter only, the Chamber of Commerce returns not being yet available, I believe that the results are as reliable as can be fairly expected for a commercial budget so important and extensive, and comprising so many categories and sub-divisions as that of Genoa.

Finance and Money Market.

According to information obtained from a reliable source, a ^{High} notable feature in the examination of the biennial period ending ^{exchange.} in December, 1893, is the comparative suddenness with which the still existing situation of high rates of exchange and low value of public stock came upon the country.

For fully 18 months, from January, 1892, to July, 1893, the Gold and variations in prices were quite unimportant, gold having risen only ^{rente.} 3 per cent. above the exceptionally low rate of $2\frac{1}{2}$ per cent. ruling at the beginning of 1892, while ^{rente,} on the other hand, improved in nearly an equal proportion (from 92 on January 1, 1892, to 94.85 on July 1, 1893), so that the price at Paris on both dates was practically the same, 90 fr.

In the last six months of 1893 there was a great change, gold ^{Great change} having risen 7 per cent. and ^{in 1893.} ^{rente} having fallen $4\frac{1}{2}$ points, so that the price in Paris on January 1, 1894, was only 80 against 90 on July 1 previous.

Since then matters have become worse, gold at the present ^{Present rates.} moment (March, 1894) being at 15 per cent. and ^{rente} at 85, making the equivalent of $73\frac{1}{2}$ at Paris.

The amount of foreign holdings on January 1, 1894, being ^{Foreign} estimated at only one-eighth of the total debt, it may be hoped ^{holdings of} that this most effectual remedy against constant and violent ^{Italian rent e} fluctuations of ^{decreasing.} ^{rente} and exchange is not beyond the reach of practical fulfilment.

The stoppage of payment late in 1893 of two important banking ^{Suspension of} companies, the Credito Mobiliare and the Banca Generale, both of ^{payment of} which had branches in Genoa, caused wide-spread alarm, and the ^{two banks.} fall of the latter establishment was the signal for a run on the principal savings banks in Italy, stopped by the prompt action of the Government in authorising an extension of circulation on the part of the banks of issue, checked also in Genoa by numerous placarded proclamations of the Sindaco, assuring depositors of the safety of the local "Cassa di Risparmio."

Under the foregoing circumstances it is gratifying to be able to record, for the City of Genoa itself, an almost total immunity from failures, with an unbroken regularity in the despatch of business. This steadiness in the presence of disaster was specially noticeable at the end of last November, when, although the suspended Credito Mobiliare was largely committed to dealings on

the Genoa Stock Exchange, the monthly settlement was carried through the very next day without a hitch. Local commercial embarrassments, both in 1892 and 1893, were so comparatively small as not to be deserving of special mention.

Bank rate of discount.

The Bank rate of discount, which stood on January 1, 1892, at $5\frac{1}{2}$ per cent., was reduced on May 28, 1892, to 5 per cent., and remained at that figure until October 30, 1893, when it was raised to 6 per cent.

With the exception of the months of November and December last, when accommodation was difficult to obtain, money has been easy during the whole of the period under review.

High premium on gold.

The present premium of gold is 15 per cent., equivalent to about 29 lire per *li.*, and we must go back 20 years to find similar figures. Appearances on the whole, perhaps, point to even higher rates, as further issues of bank-notes, in order to meet the current needs of the Exchequer, are almost inevitable, and an increase in the volume of paper-money afloat can hardly fail to produce a corresponding depreciation in the value of the *lira*.

Paper money.

But the country has grown so accustomed to dealing almost entirely in paper that no difficulty will be experienced in passing larger quantities, and the consequent rise on foreign exchanges is a positive gain to the large class of exporters in Italy, so that the balance of commercial opinion on the subject would be favourable rather than adverse.

Lack of small change.

Great inconvenience was caused, especially during part of the year 1893, by the almost entire lack of small change. Silver coin had almost disappeared (and is still conspicuous by its absence), and could only be dearly purchased at the money-changers. Even copper coinage was scarce, and, after my arrival here in June, I frequently found a difficulty in getting change for a 5-lire note when making trifling purchases, and was told that I could pay another day. In some shops change was tendered in the form of postage stamps.

Birmingham bronze.

A little later on the almost intolerable state of changelessness of the town was relieved, first by the arrival of a quantity of handsome copper 10-centesimi pieces, coined in Birmingham, and afterwards by the distribution of a number of notes of 1 *lira*. The supply of these latter not being found adequate for the demands of trade, various guilds of tradespeople united in the emission of small paper notes a little larger than those of the Treasury.

Small notes.

Tradesmen's notes.

These tradesmen's notes, "*buoni degli esercenti*," were at first pronounced an illegal issue, and I heard of some being seized by the police, but they were soon, though at first confined, each issue to its own guild, of general acceptance, but at time of writing (March, 1894) the question of their illegality has again come before the Law Courts.

2 lire notes.

Copper coin is fairly plentiful, and we hear of a proximate issue of 2-lire notes, so the great "small change question" is no longer the "burning question" of the day.

Emigration Statistics.

Genoa being the principal port of embarkation for the emigrants, of whom a large and continuous stream has for many years been flowing towards America, both north and south, an excerpt from the statistics, for which I am indebted to the courtesy of the local authorities, and which I believe to be entirely accurate, may be found of interest.

The number of emigrants leaving the port in 1892 for transatlantic countries was 85,484, while the total of those repatriated was 56,033, showing an actual drain out of portions of Italy of 29,451 of the population.

The numbers of emigrants during the five previous years were as follows:—

Year.	Number of Emigrants.
1887.. .. .	101,230
1888.. .. .	181,437
1889.. .. .	112,566
1890.. .. .	70,421
1891.. .. .	138,902

Of the emigrants of 1892, we find that 24,740 came from the Venetian province, 16,444 from Lombardy, 10,776 from Piedmont, 10,363 from sundry southern provinces, 6,709 from Tuscany, 5,262 from Liguria, smaller numbers from Emilia, the Marches, Umbria, and Rome, 280 from Sicily and Sardinia, and the remaining 5,964 were composed of foreigners.

Their destinations were, for Rio Janeiro, 28,412; Buenos Ayres, 26,261; Santos, 19,970; Montevideo, 1,185; other parts of South America, 302; the United States, 8,920; and Oceania, 434.

Of returning emigrants, 20,263 from Buenos Ayres; 19,551 from Brazil; 3,471 from Montevideo; 110 from other parts of South America, and 12,638 from New York, made up the total of 56,033 repatriated.

The percentage of professions and occupations of the emigrants appears to be, of farmers and farm-labourers, 64 per cent.; craftsmen, 12 per cent.; masons, bricklayers, and navvies, 4 per cent.; artisans, 10 per cent.; servants, 2 per cent.; liberal professions, $1\frac{1}{2}$ per cent.; merchants and traders, 6 per cent.; various, $1\frac{1}{2}$ per cent.

Forty appear to have been sent back from Genoa for want of money to go on the voyage, and 400 were rejected for irregularity in their papers.

The large number of 43,411 are reported to have had tickets furnished to them by the Brazilian Government, 82 went for account of private speculators, 4,491 were sent for and their passages paid by relatives or friends in America, 37,500 went on their own account, paying their passage.

Repatriation unsuccessful. Of the returning ones, 1,107 in distress had their homeward passages paid, either by Italian Consulates or charitable societies.

Figures of 1893. The statistics of 1893 do not present any marked differences, the total of departures being 90,854; arrivals, 51,734.

Brazilian gratuitous emigration suspended. They went from, approximately, the same districts as those of 1892, except that the Venetian province sent a smaller contingent, because of the suspension, in summer, owing mainly to the outbreak of cholera in Europe, of the gratuitous emigration at the cost of the Government of Brazil, which was chiefly taken advantage of by the poor peasants of Venetia.

Passages, how paid. First and second-class passengers numbered only 5,677; third-class, 85,177. 49,135 paid their own passage. The increased number of 6,388 were sent for by relatives in America, and passages were given by the Government of Brazil up to the end of July to 35,331.

Cholera, rejection of vessels. After that time several vessels arriving at South American ports with cholera on board were rejected, and had to return to the Mediterranean, landing the poor people at Genoa, after performing quarantine at Asinara.

Many of them told sad tales of sickness and suffering, and came back to their native land destitute after the lengthy voyage, some being sent to their homes by the police authorities, foreigners conducted to the frontier, while later on a public subscription was organised to relieve their distress.

Of the emigrants in general the proportions of professions and occupations was very similar to those of 1892.

Steamer lines. In conveying them to America—

			Number of Voyages Out.	Number of Passengers.
Italian ships made	..	..	110	86,223
German "	..	..	44	15,296
French "	..	..	19	9,340

Returned emigrants. Of those who returned to Italy, 16,819 came from the Argentine Republic, 2,170 from Uruguay, 17,516 from Brazil, 46 from other South American States, and 15,223 from North America.

			Number of Voyages Homeward.	Number of Passengers.
Italian ships made	..	..	132	36,788
German "	..	..	20	12,756
French "	..	..	17	2,111
English "	..	..	2	83
Spanish "	..	..	1	46

Labour and Wages.

The many public works and thriving industries of Genoa afford Workmen and fairly remunerative employment to large numbers of operatives, their unions. and although large workmen's societies are in existence, their system of working seems to be rather one of mutual benefit of members, provision for relief of distressed members or survivors of deceased ones, and organisation of funeral processions, than of any combination against masters, nothing in the nature of a strike No strikes. having come to my knowledge, though one workmen's association, whose principles appear to be frankly Republican, provides for the formation of a committee of delegates to arrange disputes between master and men.

The extensive works in progress for the embellishment of the Public works. town, the enlargement of old roads and opening of new ones, building of large new houses and shops, increased development of electric lighting and communication, and harbour improvements, may all be taken as indications of the general prosperity of the town, and the satisfactory condition of the labouring classes.

Of the indigent population most are stated to come from Indigency and distant and less flourishing parts of the kingdom. Many charit- charity. able organisations, both public and private, are in existence for the relief of the poor, among which I may mention a public dormitory, where anyone can find shelter and a clean bed for 5 nights, and recently a basin of soup has been provided in addition, through the kindness of a ladies' committee.

The following table of wages paid here, as ascertained by me in Wages. September, 1893, will not be found to be materially modified at the present date :—

Occupation.	Amount of Wages per Day.		Remarks.
	From—	To—	
	Lire c.	Lire c.	
Blacksmiths	3 0	4 0	
Bricklayers	2 50	2 75	
Master bricklayers	3 0	4 0	
Carpenters	3 0	3 50	
Caulkers	4 0	5 0	
Cabinet makers and joiners..	3 50	4 0	
Coal dischargers	6 0	8 0	Varying considerably, being by the piece or job
Engravers	4 0	5 0	
Foundrymen	3 0	5 0	
Goldsmiths	3 50	5 0	
Jewellers	4 0	5 0	
Labourers	2 0	2 50	
Marble workers	3 0	3 50	
Mechanics (skilled).. .. .	4 50	6 c	
Milkmen	3 0	3 50	
Omnibus and tramcar drivers and conductors	2 50	3 0	
Painters and decorators	3 0	5 0	
Plumbers	3 0	3 50	
Porters	5 0	6 0	Fluctuating, being piece- work
Road sweepers	1 70	2 0	The lowest in the category
„ foremen or gangers	2 50	2 75	
Shoemakers	3 0	4 0	
Tailors	3 50	5 0	Liable to fluctuation, ac- cording to season
Turners (in wood)	2 75	3 0	
„ (in metal)	3 0	3 50	

Engineering Works, Foundries, &c.

Slackness in
1892-93.

Information from some of the principal establishments in this district, such as those of Wilson and MacLaren, and Gio. Ansaldo and Co. of Sampierdarena, shows that considerable slackness and stagnation characterised the metallurgical industry in 1892 and 1893, but the prospect was a little more hopeful at the beginning of 1894.

Wilson and
MacLaren's.

At the former works in 1893 many men had been discharged, and the proprietors were working a good deal on stock, having a large assortment on hand of engines, boilers, engineering tools, &c., had sold from stock two steam tugs, one of 200, the other of 120 horse-power, and were working on another of 250 horse-power, the material for the boiler coming from Glasgow; they were also building a large hydraulic press, for compressing gun-powder, the cylinder, of cast steel, coming from Sheffield.

Steel ballast wagons, each carrying 20 tons, were also being completed, rather to keep old hands employed than as customary or profitable work.

At the present moment the same gentlemen report that, although there has been a long period of stagnation in all branches of foundry-work, engineering and boiler-making, so that much work has been done on stock, and many hands discharged, things are now looking a little better, and contracts have recently been made for another steam-tug, though scarcity of orders and competition had tended to reduce prices to their lowest figure.

Repairs and additions to one of the "Veloce" line of steamers, and building of steel barges for transport of ammunition, were also mentioned, with the remark that the low rate of pay rendered it necessary to purchase the materials in this country, waiting a long time for its delivery, angles coming from Savona and Terni, and plates from Sestri Ponente. This work, though giving employment to the boiler-yard hands, did not assist in the foundry or turnery. Hands were reduced to 100 in 1893, but temporarily increased recently to 140.

A good deal of material for boilers came from the "Steel Company of Scotland, Germany, and Belgium."

Messrs. G. Ansaldo and Co., of Sampierdarena, working in ^{Ansaldo and Co.} conjunction with Messrs. Maudslay, are able to build ships and their material, of the largest size, and recently built at their ^{Ship-build} yards at Sestri, the "Liguria" cruiser of 20 knots speed, 2,260 tons, and 7,000 horse-power, the "Minerva" first class torpedo-catcher of $22\frac{1}{2}$ knots speed, 850 tons, and 4,000 horse-power, also twenty excellent sea-going torpedo-boats, besides three cargo steamers, a passenger boat, tugs and other small craft and machinery for them, and had on the stocks a first class cruiser, the "Giuseppe Garibaldi" of 20 knots speed, 6,840 tons, and 13,000 horse-power.

At the boiler-works many large locomotive and marine engines ^{Locomotive and marine engines.} were turned out, some of the latter being 20,000 horse-power for the armour-clad "Sicilia," and 10,000 horse-power for the fast cruiser "Marco Polo." And the firm were building, in 1893, engines of 13,000 horse-power for the cruiser "Carlo Alberto," 13,500 horse-power for the first class battle ship "Ammiraglio di St. Bon," laid down in the Royal Dockyard at Venice.

According to the most recent information the boiler shop, one ^{Boilers.} of the largest in the world, has recently been full of work, seventeen boilers having been turned out during the last few months for vessels of the Rubattino fleet which are being overhauled. Their locomotive department has also been busier of late, orders being in process of execution for 9 locomotives for the southern railways, and 11 of the large powerful ones known as the "Vittorio Emanuele" type, used on the main line between Turin and Rome.

Messrs. Odero and Co., of Sestri Ponente, were fairly busy ^{Odero and Co.} during 1893, turning out 12 torpedo-boats, a light draught paddle-steamer for the Servian Navigation Company, and a floating dock. ^{Torpedo boats, &c.}

Distillers and condensers. Their agreement with Messrs. Brotherhood continuing, they constructed a number of air-compressing engines for the Government. They also entered into an agreement with Messrs. Kirkcaldy to construct their distillers and condensers, and provided several sets both for the Government and merchant vessels. At the present time they are making considerable extensions to their works, with a view to building two large passenger steamers and their engines for the Rubattino Line.

Passenger steamers.

It is noteworthy that, to make room for the building slips, the bathing establishment at Sestri is being demolished, and with this act Sestri Ponente loses its character as an attractive bathing resort, and becomes a purely industrial town.

Agriculture.

Small grain production. As may be inferred from the large amount of grain imported, the immediate neighbourhood of Genoa is not highly productive of cereals, the ground being hilly and stony, and the soil mostly clayey and poor. In other portions of the district, near Chiavari and Sestri Levante, there are broad flats and valleys where maize is extensively cultivated, and grows very fine.

Maize.

Fruit. The country round Genoa and the neighbouring Piedmont are very productive of fruit, peaches being wonderfully plentiful, hills and valleys being in early spring all flushed with their delicate pink bloom, while apples of excellent quality are also abundant and cheap.

Peaches and apples.

Olives and vines. The principal objects of cultivation on the surrounding hills and the lower slopes of the Apennines, and the more level ground between the foot-hills and the sea, are the olive and the vine, the latter being grown, in this neighbourhood, mostly on terraces and trellises, while in broad valleys such as the one at the "embouchure" of the Entella, near Chiavari, the vines are gracefully trained, according to the old Roman fashion, to elms, poplars, and other tall trees, and it is said that, with the higher elevation thereby attained, they yield better results.

Oil.

Wine.

Although the olives are small they yield good oil, and it is said that, wherever the olive tree grows well, people can live on the land; and as to the vines, though they do not produce as large and luscious grapes as those of the warmer south, a large quantity of rather rough wine is made in the district, and extensively consumed, while a good deal of dark red table-wine comes from Piedmont, but the better qualities from the south, notably from Tuscany and Sicily, the "Chianti" being particularly appreciated, while excellent sparkling wines are produced at Asti. Wine, to the working classes, represents the British workman's beer, and doubtless suits the climate better than the latter would do, and it is equally cheap, table wine being retailed at about 4d. a quart, and can be bought cheaper in the cask, while the burly rush-bound flasks of good red Chianti, holding about 5 pints each, are sold from 1s. upwards.

Cheapness.

The numerous large chestnut woods which clothe the neighbouring mountains furnish an immense quantity of chestnuts, which are extensively used as food in various forms. Chestnut woods.

Pine kernels are largely consumed, principally in cakes and confectionery. Pine kernels.

In addition to the peaches and apples above-mentioned, the environs of Genoa produce a large quantity of cherries and other summer fruits, and plenty of the juicy "nespole," or Japanese medlars, which are of comparatively recent introduction. Other fruits.

Oranges and lemons are extensively grown, especially in the warmer and more sheltered neighbourhood of Nervi, and the former include both the ordinary orange and the fragrant little "Mandarin." Oranges and lemons.

Near Genoa itself great damage is sometimes done to the orange crop, which seems to ripen from December to April, by severe spells of cold weather, a lot of the fruit having been ruined by the severe frost with which the present year commenced. Damage by frost.

Manure is extensively used and largely imported. Cultivation in general appears to be assiduous and thorough. Vegetables are largely grown in the lower lands, especially where irrigation can be applied, and are of fairly good quality. Green peas, grown in the open air, may be eaten in December. Vegetables.

There being hardly any pasture-land in the immediate neighbourhood, the cattle and sheep come mostly from a distance. Cattle and sheep.

The draught oxen, used in drawing heavy wains laden with stone, marble, &c., are often huge and handsome beasts, of a beautiful pale dun colour.

The Genoese are very fond of flowers, of which enormous and graceful bouquets and extraordinary devices are carried on various festive occasions. Rich flowers are varied and abundant, and their cultivation appears to be a remunerative industry. Flowers.

Hemp is but little cultivated in this part of the district, but is extensively grown in the plains of Lombardy, where there is also a considerable production of rice. Hemp.

Millet is grown in parts of the district, and brooms are made from the stems, many being exported. Rice. Millet.

Climate and Health Statistics.

Genoa seems to possess a little climate of its own, especially as regards the chill cast over it by the "tramontana," or northerly blast from over the mountains, varying in intensity from bracing (for hardy constitutions) to cuttngly-cold (dangerous to weak-chested frames), the contrasts between sunny open spaces and draughty and shaded by-streets being particularly trying. Genoa's special climate.

By going a few miles east or west, say to Nervi or Pegli respectively, by road or rail, a much warmer atmosphere is reached, and those places, especially the latter, are much frequented in winter by invalids, who can bask in the sun amid palms and orange trees while we in Genoa are shivering under the touch of Winds. Neighbouring warmer places.

	the "hard north-easter." The "scirocco," or south-west wind, is enervating, and in summer very sultry.
Bronchial and chest affections.	The effects of the peculiarly chilly and insidious winter climate of Genoa are shown in the accompanying extracts from the hygienic statistics, monthly tables of which have been supplied to me by the courtesy of the municipal authorities. These cold blasts are, however, only of occasional occurrence, and the climate generally must not be disparaged.
Summer temperature, 1893.	As far as my experience goes, having only arrived here in June, 1892, from Morocco, the summer shade temperature was seldom over 82 degrees, and only once up to 86 degrees, while much greater heat was registered in neighbouring places of the coast and interior.
Winter.	As for the winter, the year 1894 began with a sharp spell of frost and a little snow, accompanied by a strong attack of the mingled forces of influenza, bronchitis, and catarrh, but February has been a fairly pleasant month, ending with weather almost more than springlike.
Population.	The population of Genoa on December 31, 1893, was as follows:— Resident population, male, 99,015; female, 101,480; total, 200,495. Total floating population, 11,448.
Death and birth rates.	Deaths during 1893 were 5,242, or 24·6 per 1,000; births, 5,798, or 28·6 per thousand.
Causes of death.	Among causes of death we find infantile immaturity, atrophy, and congenital ailments, 243; of contagious and infectious diseases, diphtheria (including croup and other diphtheric forms) carried off 253 persons, while we have 14 cases of syphilis, 9 of blood-poisoning, 5 of malarial fever, and 2 of hydrophobia; in constitutional maladies there are 117 deaths from senile marasmus, 64 from tuberculosis, 25 from malignant tumours, and 14 from diabetes; disorders of the nervous system give the large figures of 252 deaths from apoplexy, 209 from meningitis (both simple and tubercular), and 174 from convulsions and fits; diseases of the respiratory organs show 396 deaths from bronchial diseases, 762 from pneumonia and acute catarrh, 135 from chronic catarrh, 413 from pulmonary tuberculosis, and 20 from asthma; maladies of the circulatory apparatus give 260 deaths from heart disease, and 61 from syncope; in ailments of the digestive organs there were 421 deaths from enteritis and diarrhoea, hepatitis 68, gastritis 53, peritonitis 41; while, among various other categories, we find homicides 8, suicides 35, and deaths from unknown causes 119.
Cholera.	But, while there is a blank against the item of Asiatic cholera, I must observe that, in a report addressed by the provincial physician to the Sanitary Board on "Measures adopted by the Prefecture to prevent the development and spread of cholera," he states that, in addition to "suspicious cases," there were altogether 27 cases of "true cholera," of which 14 occurred at Genoa, 1 at Sampierdarena, and 12 at Pallare, a small place in the Savona district.

Fisheries.

The Mediterranean in the neighbourhood of Genoa is not very rich in fish, and the supply furnished by the local nets and lines has frequently to be supplemented to meet the large local demand by consignments of fish from the Adriatic by train, in addition to the large quantities of preserved fish imported from England, Spain, Sweden and Norway, North America, Denmark, Portugal, and France.

Comparatively few tunnies are taken in this neighbourhood, but a considerable number of sword-fish, also striped bonito and mackerel.

Sardines and anchovies are at times plentiful.

Horse-mackerel and gar-fish are also abundant, and in summer a good many fine flying fish are caught.

Turbot and soles are found on suitable ground, and are of excellent flavour.

Mullet, both red and grey, are very numerous.

Skates, and other rays of various kinds, including sting-ray, angel-ray, and "sea-angler" or "fishing frog" appear to be all eaten here, as well as the various dog-fish and sharks.

There are a good many conger-eels and murænas, several varieties of the gurnard tribe, and fine specimens of the "dentex" and "chrysophrys" families are often seen on the slabs.

The bass is fairly numerous, and attains a large size.

There are many individuals of the bream family, numerous wrasses and other rock-fish, and a great abundance of both "box vulgaris" and "box salpa."

The "gadidæ" appear to be represented only by the hake, which is plentiful and much esteemed, and the "great fork-beard."

Cray-fish are fairly plentiful, lobsters scarce, while a good many prawns are found, but hardly any shrimps. Small oysters only appear to be found in this neighbourhood, but better ones come from Spezia, Taranto, and Naples.

Of fresh-water fish, pike sometimes come here from Lago Maggiore; eels from various places; trout may be caught high up in the Apennines, but hardly ever get into the market; waters lower down produce chub and small barbel, and sometimes tench.

As might be expected, fish are by no means cheap on the Genoa market, the price, though varying according to weather and supply, averaging, according to quality, from 2 lire to 5 lire per kilo., or say 9*d.* to 2*s.* per lb.

It is gratifying to note that the comparatively modern industry of pisciculture which has produced such excellent results in many parts of Europe and notably in our Australasian colonies is not entirely neglected in Italy, as a local paper recently stated that, under the direction of the Minister of Agriculture, three lots of eel-fry were recently put into Lake Maggiore; 50,000 trout-fry into the River Oglio, for the benefit of Lake Iseo, and another lot of trout into the waters round Belluno.

Fisheries round Genoa.

Consignments from Adriatic. Importation of preserved fish.

Tunny, sword-fish, bonito, mackerel.

Sardines and anchovies. Horse-mackerel and gar-fish. Flying-fish. Turbot and soles.

Mullet. Skates, rays, dog-fish.

Congers, murænas, gurnards, &c.

Bass. Bream, &c.

Hake numerous.

Cray-fish, lobsters, and prawns. Oysters.

Fresh-water fish.

Prices.

Re-stocking of lakes and rivers.

ANNEX A.—RETURN of all Shipping at the Port of Genoa during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	20	8,585	902	1,227,869	922	1,236,454
Italian ...	2,656	282,481	1,363	1,164,108	4,019	1,446,589
Austrian ...	9	5,268	160	131,731	169	136,999
French ...	4	1,396	130	99,958	134	101,354
German ...	1	550	171	350,902	172	351,452
Greek ...	18	5,432	83	92,249	101	97,681
Norwegian ...	16	4,212	75	64,635	90	70,847
Danish ...	9	1,740	16	12,833	25	14,573
Spanish ...	5	180	31	29,841	36	30,021
Russian ...	1	284	1	914	2	1,198
Ottoman ...	2	884	...	...	2	884
Dutch ...	...	...	56	133,917	56	133,917
Belgian ...	...	...	19	17,290	19	17,290
Samote ...	...	...	1	693	1	693
American ...	1	1,329	...	...	1	1,329
Chilian ...	1	579	...	...	1	579
Swedish ...	2	1,652	3	2,224	5	3,876
Total ...	2,753	316,552	3,093	3,329,167	5,846	3,645,719
„ for the year preceding ...	2,899	323,715	2,967	2,987,270	5,866	3,315,985

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	26	7,881	945	1,217,886	971	1,225,767
Italian ...	2,656	298,889	1,435	1,147,494	4,091	1,446,383
Austrian ...	7	3,213	161	132,721	168	135,934
French ...	4	1,097	130	110,527	134	111,624
German ...	2	1,738	168	337,862	170	339,600
Greek ...	19	6,667	79	86,438	98	93,105
Norwegian ...	15	5,002	70	58,781	85	63,783
Danish ...	7	925	18	11,745	25	12,670
Spanish ...	5	154	30	27,371	35	27,525
Russian ...	1	284	1	914	2	1,198
Ottoman ...	3	879	...	...	3	879
Dutch ...	...	...	88	134,119	88	134,119
Belgian ...	...	...	19	17,269	19	17,269
Samote ...	...	...	...	...	...	...
American ...	1	1,329	...	...	1	1,329
Chilian ...	1	580	...	...	1	580
Swedish ...	4	2,506	5	4,134	9	6,640
Total ...	2,751	331,644	3,149	3,287,821	5,900	3,619,465
„ for the year preceding ...	2,812	326,685	4,204	2,980,739	7,016	3,307,424

**Annex B.—RETURN of Principal Articles of Export from Genoa
during the Years 1893–92.**

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			\$		\$
Bran	Tons ...	687	3,549	90	465
Butter	" ...	483	41,598	332	28,592
Cheese	" ...	1,094	74,477	770	62,420
Chestnuts	" ...	1,439	12,083	1,042	8,750
Coral	Lbs. ...	44,061	125,750	39,815	113,632
Earthenware	Tons ...	137	980	251	1,796
Fish... ..	" ...	237	10,996	277	12,852
Fruits, dried	" ...	411	10,840	411	10,840
Furniture	" ...	195	38,648	144	23,540
Glue	" ...	399	10,367	467	11,874
Hats	" ...	980	157,210	296	47,484
Hemp	" ...	957	34,452	407	14,652
Hides—					
Raw	" ...	355	23,423	213	13,770
Tanned	" ...	741	110,362	734	109,320
Marble and statuary	" ...	3,122	60,683	2,812	54,640
Matches	Lbs. ...	1,492,893	40,467	864,866	23,455
Meat, salted and smoked	Tons ...	320	30,598	323	30,885
Minerals	" ...	7,411	123,214	10,943	189,320
Olive oil	" ...	5,368	236,326	7,310	321,823
Paper	" ...	3,109	77,503	2,804	69,900
Rice	" ...	15,751	245,721	15,291	238,545
Seeds	" ...	117	3,368	330	9,500
Silk, in all forms	Lbs. ...	1,457,603	926,116	2,622,738	1,666,408
Soap	Tons ...	371	20,349	478	26,217
Stone, earth, bricks, &c....	" ...	5,226	6,430	5,118	6,307
Sulphur	" ...	2,670	11,745	1,272	5,600
Timber	" ...	1,295	3,495	780	2,123
Vegetable products	" ...	6,505	23,420	4,735	17,043
Wine—					
In casks	Gallons ...	3,990,380	217,683	5,179,922	282,577
Bottles or flasks	Bottles ...	2,614,611	167,657	2,806,383	169,221
Wooden ware	Tons ...	641	15,325	521	12,456
Woollen tissues	" ...	170	54,091	113	37,546
All other articles	" ...	...	1,822,103	...	435,043
Total	...	...	4,735,006	...	4,053,606

RETURN of Principal Articles of Import to Genoa during the
Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value
	Tons.	£	Tons.	£
Chemical products ..	38,788	384,246	26,655	296,304
Coals	1,438,456	1,610,994	1,476,699	1,653,824
Cocoons.. ..	452	171,790	627	238,080
Coffee	6,494	597,470	7,205	662,884
Copper and brass ..	2,519	153,106	1,605	97,552
Cotton, raw	72,440	2,730,222	74,261	2,798,992
" manufactured ..	771	256,352	803	266,992
Dye-stuffs	12,041	244,233	12,077	242,004
Fats	10,928	286,359	11,168	292,648
Fecula (potato flour) ..	7,849	181,816	4,066	63,306
Fish, preserved	13,701	360,153	12,724	334,524
Grain, sundry	15,894	85,928	29,954	161,688
Guano	12,571	50,295	8,966	35,864
Gums and resins	7,820	512,689	9,494	621,224
Hides	10,097	639,042	8,115	518,700
Iron, old	52,806	138,562	56,825	149,108
" cast	22,327	71,896	20,164	64,524
" wrought, and steel	13,996	203,724	12,647	184,088
Lead, tin, zinc, &c. ..	2,370	437,752	3,113	474,316
Machinery	3,471	192,593	3,167	175,696
Oils, mineral	24,446	137,868	22,969	129,538
Palm-oil	3,179	82,663	2,990	77,748
Seeds	50,092	654,043	39,374	514,100
Silk, raw and waste ..	550	442,004	514	413,332
" manufactured ..	9	36,036	11	44,044
Sugar	51,736	725,562	53,472	749,908
Tobacco.. ..	4,354	186,003	4,875	208,260
Vegetable fibres (hemp, flax, &c.)	11,573	185,559	4,883	77,948
Wheat	306,881	2,083,425	263,571	1,792,280
Wool, hair, &c... ..	2,416	68,054	4,029	113,438
" manufactured ..	300	276,077	359	330,372
Wood (timber).. ..	44,566	113,707	33,102	84,476
" manufactured ..	1,582	58,346	1,407	51,860
All other articles	..	630,573	..	231,652
Total	..	14,935,692	..	14,151,824

Annex C.—TABLE showing Total Tonnage of all Articles Exported from and Imported to Genoa from and to Foreign Countries during the Year 1892, with Total Values for 1892-93.

Country.	Exports.		Imports.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Great Britain	14,345	..	1,560,247	..
Africa	2,809	..	28,900	..
North and South America	67,098	..	156,760	..
Asia	2,289	..	109,035	..
Austria	1,793	..	15,639	..
Belgium	1,715	..	21,620	..
Denmark	273	..	541	..
France	7,072	..	62,261	..
Germany	8,609	..	34,888	..
Greece	1,213	..	410	..
Holland	1,105	..	3,735	..
Malta	344	..	..	..
Russia	135	..	217,051	..
Spain	3,047	..	18,036	..
Portugal	119	..	555	..
Sweden and Norway ..	..	..	5,864	..
Switzerland	8,585	..	606	..
Turkey	8,139	..	37,281	..
Total	128,690	4,053,606	2,273,479	14,623,182
„ 1893	..	4,735,006	..	14,935,692

SAVONA.

Mr. Vice-Consul Ponzone, in reporting for 1892, refers to a Depressed diminution of imports which he attributes to the depression of trade in 1892. trade in general, and the stoppage of several local industries, including the large iron and steel works of Messrs. Tardy and Benecke, taken over toward the close of the year by the “Società Iron and steel works. Alti Forni,” of Terni, and soon afterwards partially re-opened.

Another cause of the slackness in shipping and trade appeared to be the want of enterprise at Turin and the neighbouring parts of Piedmont, which almost entirely depend on Savona for their supplies from abroad.

For 1893, Mr. Ponzone reports as follows:—

As I anticipated, our general trade shows some improvement, Improvement although we had an important drawback on the amount of coal in 1893. Coal. imported, owing to the colliery strike in England, partly counter-balanced by the increased value resulting therefrom.

Local industries, as well as those in the neighbouring parts of Local Piedmont, are far from being in good swing, but those which could industries. stand the financial crisis of the last few years are working on with rather better prospects before them, and, unless fresh trouble be in

store for them owing to the serious state of Italian finances in general, they should continue slowly improving, and keep up the yearly increase in our general trade.

Crops good.

During the year 1893 our principal crops have given very satisfactory results compared with those of the previous few years, and this has doubtless contributed toward the alleviation of the prevailing distress among the working classes, as prices of their most important staples of food, wheat, maize, wine, olive oil, fruits, and vegetables have generally been very low.

Food of working classes.

With the exception of fruits and vegetables, which are largely sent by rail to inland markets, the agricultural produce of this neighbourhood is almost entirely taken up by local consumption.

Dynamite.

I observe in Mr. Penzone's export table the item of 89 tons of dynamite shipped in 1893 (none in 1892). It appears that this dynamite was manufactured at Arrigliana, near Turin, and was sent in an English steamer to Port Vendres, in France, whence it was to be re-shipped for the Transvaal.

Annex A.—RETURN of all Shipping Entered at the Port of Savona during the Year 1893.

Nationality.	Number of Vessels.		Total.	
	Sailing.	Steam.	Number of Vessels.	Tons.
From abroad—				
British	..	193	193	244,088
Italian	29	22	51	83,588
Greek	3	21	24	23,086
German	..	17	17	18,027
Austrian	..	9	9	10,182
Other countries ..	2	23	25	21,357
	34	285	319	350,278
From the Italian coasts—				
Italian	466	30	496	41,381
Total	500	315	815	391,659
„ 1892	586	269	855	356,319

Annex B.—RETURN of the Principal Articles of Export from
Savona during the Years 1892-93.

Articles.	1892.		1893.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Wooden hoops and common wood ..	1,653	15,475	1,826	14,650
Dross of iron ..	4,400	1,100	1,360	340
Terra-cotta wares and tiles ..	367	1,101	314	975
Candied fruits ..	72	5,040	81	5,670
Oranges and lemons ..	259	1,804	162	1,134
Dynamite ..	..	..	89	17,800
Total ..	6,751	24,520	3,882	40,569

RETURN of the Principal Articles of Import to Savona during
the Years 1892-93.

Articles.	1892.		1893.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coals ..	371,502	333,562	381,972	400,602
Pig-iron and puddle bars ..	15,321	46,463	23,781	71,943
Old iron and steel ..	10,982	30,735	29,342	82,157
New iron and other metals ..	905	6,159	990	9,401
Wheat ..	24,362	194,896	47,586	380,688
Other grains ..	1,942	11,677	726	4,356
Locust beans ..	2,763	11,742	1,355	5,758
Petroleum ..	5,705	34,230	5,893	35,358
Clay, &c. ..	9,015	4,360	12,322	6,767
Tin plates ..	491	7,850	481	7,215
Carbonate of soda, &c. ..	1,455	8,730	230	1,380
Wood in logs ..	1,233	1,850	1,490	2,235
Manufactured guano ..	1,222	4,888	400	1,600
Rough jute ..	..	..	360	5,760
Total ..	446,898	697,141	506,928	1,015,220

Annex C.—TABLE showing the Total Value of all Articles Imported and Exported at the Port of Savona from and to Different Countries during the Years 1892-93.

Country.	Imports.		Exports.	
	1892.	1893.	1892.	1893.
	£	£	£	£
Great Britain	404,097	539,856	3,088	4,188
Russia	111,520	204,767	28	..
Spain	21,912	19,186	1,112	748
Roumania	70,608	186,896	..	..
Turkey	40,244	6,493	700	378
France	7,162	7,019	17,264	33,261
United States	21,506	29,897	350	..
Germany	6,377	11,754	..	..
Belgium	3,689	4,599	..	..
Other countries	10,046	4,753	1,978	2,044
Total	697,141	1,015,220	24,520	40,569

SAN REMO.

Commercial
dulness. 1892.

Mr. Vice-Consul Congreve, in reporting for 1892, stated that nothing of special commercial interest had occurred.

Visitors and
season.

He mentioned the place being very full of foreign visitors during the first 4 months of the year, while there was nothing doing during summer, and so little in autumn that the season was practically a 4 months' one.

Although in April and May many villas were leased almost exclusively by English visitors for the ensuing winter, and the tenants arrived in October or November, there was no great influx of visitors until later, attributable partly to some fear that cholera might break out in the South of France, and also to the increasing number of travellers who now go further afield—to Egypt, Morocco, the Canary Islands, and even to India.

Health good.

The town was healthy all the year, suffering from no epidemic, except a mild one of influenza in spring.

Water and
cleanliness.

Water was excellent and abundant, and great care was taken to keep the town clean.

Agriculture.
Poor olive
crop.

Agriculturally, the year was as bad as 1891, the olive crop, which at first promised well, turning out almost a complete failure. Lemons and grapes turned out about as usual, but their cultivation is comparatively unimportant. There was a slight increase in the exportation of flowers and fruits.

Improve-
ments talked
of.

Nothing further was done to improve the port, the long-talked of electric light not being introduced, nor the Casino or "Kursaal" begun.

Customs and
other revenue.

Revenue returns showed an increase over 1891, and the relative amounts were as follows:—

				Amount.	
				1892.	1891.
				£	£
Customs ..	..	..	..	4,161	2,880
Stamp duties ..	..	..	..	14,177	14,156
Octroi ..	..	..	..	19,351	17,563
Post office ..	..	..	..	4,738	4,708

For 1893 there appeared again nothing of commercial import- 1893, little
ance to report, the town, though numbering over 18,000 native and trade.
about 5,000 of floating population, being mainly dependent on the
winter season for its prosperity.

No English merchant ships visited the port, the principal Shipping.
vessels that go there being small native craft bringing wine from
Sicily and marble from Carrara.

The port is not good, being shallow, and so open to the east as Port improve
to be unsafe in bad weather, but the authorities are expending ments.
some 8,000*l.* in lengthening the chief mole, and further improve-
ments are contemplated later on. It is to be hoped that they may
result in making it feasible to receive coal direct from Newcastle
and Cardiff, instead of getting it, as now, from Oneglia or Savona
by rail.

A new line of railway is in process of construction down the New railway
Roya Valley, from Turin by Cuneo to Ventimiglia, which will, line.
doubtless, when completed in a year or two, bring more trade to
San Remo, as there is no port whatever at either Ventimiglia or
Bordighera.

The chief trade of San Remo is in oil, but the olive crop was Poor olive
again almost a failure. When plentiful, as it nearly rivals that of crop.
Lucca, it is largely exported to Germany and other countries.

The grape and lemon crop were again average but unimportant ; Lemons,
the exportation of flowers considerably on the increase. grapes,
flowers.

The season for foreign visitors was above the average, all the Visitor
hotels and villas being full ; several properties bought by intending season good.
residents and some new villas built.

The usual stagnation prevailed during summer, and the end of
the year was not so good as the beginning.

A large new hotel was being erected on the east side, but New hotel.
nothing more was being done about the Casino or the electric
light.

Revenue returns again showed an increase, except in the Revenue
customs dues, which only amounted to 3,537*l.*, against 4,161*l.* in increased,
1892. except
customs.

SPEZIA AND MASSA-CARRARA.

*Trade and Commerce.**General Remarks on the Nature and Condition of Local Trade.*

Condition of local trade.	Trade and commerce at the port of Spezia are slowly recovering from the stagnation into which they lapsed during 1890-91.
Future development of trade.	The future is full of hope. The great railway and harbour works in course of construction will of a necessity give an altogether new opening for commercial activity, from which British trade and shipping will reap the principal benefit. Apart from the annual supply of coal needed by the Italian Navy, it is estimated that at least 200,000 tons more coal than at present imported will annually pass through the port (and even before the completion of the harbour); 100,000 tons alone being needed for the gasworks of towns affected by the new Spezia-Parma Railway.
Nature of trade.	Hitherto commercial activity at this port has centred in the needs of the Royal Italian Navy, the dockyard, and other naval and military establishments, a few large industrial establishments, and some minor local industries, and in catering to the modest requirements of the local population in which the naval element predominates. The luxuries of life find but a small market in this district, where the wealthy resident foreign colonies of other towns on the Riviera are altogether absent. Local needs have hitherto been supplied from the principal Italian centres of production or importation of food-stuffs, household requisites, furniture, and clothing. These are mostly of Italian and German manufacture. British trade with this port has continued to hold its own in coal and iron, the demand for which can only increase in proportion to the gradual development of the Italian Navy. German coal after exhaustive tests has been found inferior, and railway transport too expensive to enable it to compete with British coal. Italian lignite, on the other hand, has been tried and found useless. German coal would, therefore, only be resorted to in the event of a naval blockade, after the exhaustion of the large supplies of Welsh coal prudently kept in store by the Italian Navy. The adoption of petroleum refuse as fuel for ships of war and its increasing consumption will not affect to any very great extent the use of coal; for this mineral oil is used not solely as fuel, but in conjunction with coal.
German competition.	The advantage of cheap production, cheap freight, and a marked local preference for cheapness at the expense of quality and durability, render British competition with German enterprise in the minor miscellaneous articles of trade, such as hardware, stuffs, household requisites, gutta-percha, a matter of no little difficulty.

It is worthy of note that many articles originally imported from Great Britain and now made in Italy bear English trade marks or English words, whereof bad spelling will often betray the origin.

The old fashioned modes of procedure in the search of a market from which British manufacturers seem unable to wrench themselves and by which they are seriously handicapped, have been condemned in more than one consular report of recent years.

The general question of German competition is so serious a matter for British industry and commerce that I may be pardoned for referring to the subject again this year.

The German manufacturer has long ago grasped the facts in his favour and has made the most of them. His success in finding a market in Italy, apart from the advantage of cheap production, may be ascribed partly to his being satisfied with any order, however small, partly to the initiative, plodding determination, and knowledge of languages, possessed by his innumerable commercial travellers, who are satisfied with modest accommodation and humble fare.

The German manufacturer has been willing to recognise the needs and tastes of the buyer however much the latter may differ from his own conception of perfection.

He is also ready to give credit.

As a general rule the Italian tradesman is prudent and cautious, his working capital not large. He seldom can bring himself to give an order, save by word of mouth after much debating and testing of samples.

I have duly answered the circulars addressed to Consuls by British manufacturers and merchants who, desirous of increasing their business in the neighbourhood, ask for lists of the principal importers of the goods they deal in. But I am convinced that the time and trouble taken by the consular officer in compiling accurate lists of reliable firms are utterly wasted, for the circulars and price lists in the English language, subsequently sent to the persons named, are but so much waste paper.

Latterly French price lists are being sent here; but to be of any real use in Italy, they should be drawn up in Italian. Even then it is vain to expect that the posting of circulars can ever hope to compete with the many advantages of the personal interview with a commercial traveller conversant with the language and habits of the country.

British merchants should adopt more effective measures if they wish to retain their markets in Italy in the face of German competition.

Articles of British production for which a market might be found in this district could now be shipped direct to Spezia in British steamers sailing from Cardiff, Newcastle, and London at very low freight. Articles for which a market could be found.

Importers of British groceries, tinned meats, preserves, pickles, biscuits, &c., are now obliged to procure their supplies from the wholesale importers at Genoa and Leghorn at a greatly increased

cost, because the present demand will not enable them to conform to the requirements of British manufacturers who will only take up large orders of each article.

Signor Carignano, a leading merchant here, tells me that these articles would by degrees find plenty of purchasers, if direct importation from England were to bring down the present high prices due to the increased freight and the profit required by the wholesale dealer.

The same might be said about British hats, tailorings, hardware, stationery, carpets, &c.

Increased
opportunities
for shipping
cargoes direct
to Spezia.

The opportunity of shipping to this port will, without doubt, be considerably increased in the near future.

With reference to the commercial prospects of Spezia, in connection with the new harbour and railway, it is interesting to note the opinions expressed in recent commercial reports by Her Majesty's Consuls at Genoa and Leghorn as to the effect which the transformation of Spezia into a first class harbour would have on the trade of those two ports.

Mr. Consul Yeats-Brown, C.M.G., reports in 1891 as follows:—

"The other work of great importance I allude to is the new commercial port of Spezia. It is entirely detached from the arsenal in a very convenient position, from which it can easily be put in connection with the railway and where there is ample space of flat ground on which every modern convenience in the way of docks and warehouses can be easily and cheaply built. And as the new Spezia-Parma Railway will put Spezia in very immediate communication with the centre of affairs in Upper Italy, it will be the port of discharge for all that part of the country, and will relieve Genoa of some part of the traffic which is apt to suffer periodically from congestion."

Mr. Consul Chapman in his report on the trade of Leghorn for 1892 gives it as his opinion that:—

"Leghorn seems likely to have to encounter another considerable obstacle in the near future, a new line of railway connecting Spezia and Parma is rapidly being pushed forward by the Mediterranean Railway Company, and is likely to be completed next year. The great hemp producing district of Bologna will thus find another outlet for its produce; and if British Mediterranean lines of steamers once find sufficient inducement to call regularly at Spezia it is probable enough that that port may to some extent become a rival to Leghorn not only as a channel of export for the products of Bologna and the neighbourhood, but being much nearer Carrara than Leghorn, it may also secure the principal share of the marble which has hitherto been so valuable an item in the completion of cargoes at this port."

Imports and Exports.

Value of
imports and
exports

The total value of imports at Spezia has been as follows for the last three years:—

Year.						Value.
						£
1891..	..	..	..	..	..	357,489
1892..	..	..	..	..	..	352,418
1893..	..	..	..	..	..	423,563

thus showing a fair increase due principally to the larger importation of coal, petroleum fuel, wheat, iron, steel, and sulphate of soda.

The tables of the total values of imports and exports from and to foreign countries, showing the proportion of trade between the port of Spezia and each country separately, cannot be obtained at the custom-house, where no such statistics are compiled.

Spezia has no chamber of commerce, and the values of the goods destined for the Navy are not known. Hence the impossibility of compiling these tables.

The table of exports would be practically useless as only a very small portion of the only exports of value are shipped at Spezia.

The principal imports at Spezia come from Great Britain and Russia, and the figures given below, though obtained from various sources, may be taken as fairly reliable.

Imports from Great Britain during 1893 show a marked increase on those of the year preceding.

The value of imports from Great Britain, not including Australian ores for Pertusola, during 1893 was approximately 123,500*l.*; from Russia 188,900*l.* In 1892 the value of imports were from Great Britain, 96,500*l.*; from Russia, 139,200*l.*

A small part of the imports given in table B annexed, reaches Spezia overland.

Coal and coke imports for the past year consisted of 79,000 tons of Welsh coal for the Italian Navy, about 20,000 tons of north country coal for the dockyard workshops, the Spezia and Sarzana gasworks, foundries, mills, and minor factories; and 13,322 tons of Newcastle coal and coke for the Pertusola Lead and Silver Refining Works. 9,100 tons were brought in Italian steamers.

The total import of coal and coke in the district of Spezia for the past three years was:—

Year.						Quantity.
						Tons.
1893..	..	..	..	..	..	112,538
1892..	..	..	..	..	..	87,798
1891..	..	..	..	..	..	68,830

Of the above the Pertusola Lead and Silver Refining Works came in for the following amount of north country coal and coke:—

Year.						Quantity.
						Tons.
1893..	..	..	..	..	..	13,322
1892..	..	..	..	..	..	19,495
1891..	..	..	..	..	..	19,340

The decrease being due to the superior quality of the ores smelted at the works during the past year.

No coal is used here for domestic purposes. Charcoal from the Maremma or the upper valley of the Magra and a little coke are used in the kitchen. Only wood is burnt for house heating; chiefly oak brought in greater part from Central Italy.

Other principal imports from Great Britain. Sulphate of soda. Iron and steel.

The other principal imports from Great Britain were:—

Sulphate of soda, for Signor Giacomini's glass works at Sarzana imported in British steamers: 150 tons in 1893 and 104 tons in 1892, showing a considerable increase in favour of 1893.

Old iron: 93 tons in 1893 as compared to 46 tons in 1892.

Pig iron: 486 tons in 1893 and 213 tons for 1892, the greater portion of it for MM. Larini, Nathan and Co.'s Ironworks.

Iron steel bars and plates: 307 tons in 1893 and 156 tons in 1892.

Wrought-iron and steel: 327 tons in 1893 as against 166 in 1892.

Other metals.

The same increase is found in other metals; copper, brass and bronze showing 18 tons for 1893 as against 10 tons for 1892.

The zinc imported at Pertusola for use in the silver refining process during 1893 shows a decrease on the amount imported during the preceding year:—127 tons in 1893 as against 163 in 1892.

Machinery.

From Great Britain also comes a part of the 67 tons of machinery put down for 1893 and of the 122 tons entered for 1892, nearly all for the Italian Navy; a considerable portion appearing to consist of dynamos and electric gear from Germany, and some electric instruments from France imported by rail.

War material.

The total value of imports under the head of iron and steel has greatly decreased latterly, for the guns and gun mountings supplied by the firm of Sir William Armstrong and Co. no longer come from Elswick but from the Pozzuoli Works; and ships engines are mostly now being made in Italy on British models.

The Pertusola Works received during 1893, 4 tons of machinery, worth 128*l.*, and also 11 tons of bone-dust for the silver-refining crucibles.

Plaster and cement.

The 700 tons of "mineral earths" imported during 1893, as well as the 718 tons during 1892, chiefly consisted of plaster and cement from Great Britain for the new commercial harbour works, the Spezia-Parma Railway tunnel works, military works, and private house building.

Bricks and tiles.

Tiles and bricks, another principal item in the return of

imports show an increase during the past year; the figures being 796 tons for 1893, as against 649 tons for 1892. Of these 796 tons, fire-bricks for Pertusola amounted to 188 tons, and the remainder consisted nearly entirely of fire-bricks for furnaces, and bricks of peculiar shape for torpedo-boat boilers, for the Italian Navy.

Some pitch is also annually imported from England for the patent fuel factory of Messrs. Raggio and Co. for the supply of the Italian Government.

Lastly, I mention as coming from the British colonies via London, 1,733 tons of rich Australian lead and silver ores.

From Russia a considerable quantity of wheat is imported annually by Messrs. Merello Bros. for their extensive mills here; the flour, and the semolina (broken wheat) for the manufacture of macaroni and other Italian pastes, being nearly all of it shipped to Sicily and Naples by the steamers of the Italian General Navigation Company, which call here for the purpose once a fortnight.

21,402 tons were imported from South Russia during 1893; 16,214 tons during 1892, and only 14,000 tons in 1891. The business of the firm is shown by these figures to be rapidly increasing.

Except the middlings and sharps and some of the semolina for the Italian paste manufactories, very little of the Merello mill produce is sold in the district. The Merello Bros. also have a similar factory at Cagliari for the supply of the Sardinian markets.

From Batoum an important article in the return of imports mentioned in the annexed form B, namely petroleum refuse, is shipped direct to Spezia, principally under the Greek flag. This article of importation promises to increase considerably, as its use has been found most valuable on Italian ships of war as fuel in conjunction with coal.

2,670 tons of this petroleum refuse, valued at 13,352*l*., were stored during 1893 in the Spezia liquid fuel tanks belonging to the Royal Navy.

The amount imported during 1892 was almost nil.

From Sweden, the United States, and from Corsica a little less than the usual amount of timber reached this port during the past year, the figures being 2,117 tons in 1893, as against 2,297 tons in 1892.

It should be noted that no Indian teak has been imported since 1889. Last year's timber comprises 500 tons of pine from Corsica; 1,000 tons, or thereabouts, of pitch pine from Sweden; the remainder, pitch pine and teak, from the United States.

Coffee, sugar, salted and dried fish, &c., in transit, via Genoa, came in insignificant quantities that have not shown any great variations.

Third in value of all the imports mentioned in return B are those classed under the heading of metallic minerals, and they consist solely of lead and silver ores for the Pertusola refinery.

The figures being as follows :—

Year.						Quantity.
						Tons.
1891..	..	..	..	..	..	4,070
1892..	..	..	..	..	..	10,729
1893..	..	..	..	..	..	9,896

But the ores imported from foreign countries to Spezia during the past year are but a small portion of the ores brought for the Pertusola refinery, of which the total value reached in 1893 nearly 400,000*l*.

The bulk of the ores come from the Sardinian mines belonging to the Company; 27,275 tons in 1892 and 20,394 tons in 1893.

But while the imported ores from Sardinia have annually decreased in quantity, those from foreign countries have gradually increased since 1887, as will be seen by the following figures.

The total amount of ores smelted, however, has decreased, while the annual output has gradually become larger. This is explained by the fact of the superior richness in lead and silver of the foreign imported ores.

The gradual increase in the quantity of the latter importation, and the mode of obtaining the same at low cost, is an interesting feature in the attempts of the Pertusola Company to make up for the diminishing profits of the refinery, due to the disastrous fall in the value of silver and lead.

During 1887 only 44 tons appear in the tables collected by me from the custom-house, as having been imported from foreign countries.

The figures rose to :—

Year.						Quantity.
						Tons.
1888..	..	..	..	..	..	989
1889..	..	..	..	..	..	1,682
1890..	..	..	..	..	..	2,366
1891..	..	..	..	..	..	4,070
1892..	..	..	..	..	..	10,729

The ores imported during 1893, though slightly inferior in quantity, were in part far richer in quality. Of the 9,896 tons of foreign ores imported during the past year, I find from the custom-house returns that 4,660 tons came direct to Spezia from Greece by Italian steamers; 745 tons from Spain, also under the Italian flag, but, like all the following, brought to Genoa simply as ballast, from whence it was conveyed to Spezia by coasting steamer.

490 tons of the Mexican and South American ores came to Genoa, or via Liverpool, from South America in Italian ships;

119 tons from Hamburg to Genoa in German steamers; 98 tons from Marseilles; and lastly 833 tons of a very rich Australian ore shipped as ballast to Great Britain, and carried to Pertusola from London by the General Steam Navigation Company steamers.

Exports.

Very little is at present exported from the harbour of Spezia. Value of The total value of exports for the entire district does not exceed exports. 950,591*l*.

The exports consist of copper ore from the mines of Sestri Levante shipped to France; 6,607 tons in 1893, and 8,277 tons in 1892; 6,444 tons in 1891. Copper ores.

47 tons of paving stones were exported direct from Spezia in 1892; none in 1893. Paving-stones.

Marble from the Spezia coloured marble quarries shipped direct to foreign countries was less than 6 tons in 1892, and only 4 tons in 1893. Spezia marble.

The bulk of the marble from the Spezia and Levanto quarries is sent to Carrara by rail, and worked there before export via Genoa and Leghorn.

The Carrara marble exports, of which a considerable quantity goes to Great Britain and the colonies, and especially Australia, are referred to under the remarks on Carrara quarries.

Artificial manures exported amounted to 55 tons in 1892, and 68 tons during the past year. Artificial manures.

The export returns hereto annexed do not convey any idea of the considerable output from the Pertusola Refining Works, as the principal portion goes to Genoa by rail or by coasting steamers of small tonnage, the remainder by rail to Central Europe.

Of the lead sent to Genoa, the greater portion is used in the manufactory of painter's white-lead which the Pertusola Company own at Cogoletto, near Genoa. Lead.

Of the 491 tons of lead shown in the return as exported during 1893, 414 tons were shipped direct from Spezia to Trieste, 35 tons to Odessa, and 40 tons to Bombay.

The antimonial lead is sent to Germany for the manufacture of printing letters and steel-cased rifle bullets. Some of it is sold in Italy.

The 6,747 tons of ores given as exported from the district comprise, in addition to the copper ores above mentioned, 140 tons of the Sardinian lead ores brought to Pertusola, and which were shipped to Antibes in France, for use in the pottery manufactory there. Lead ores.

The Sardinian ores from the mines of Montepone, near Cagliari, belonging to the Pertusola Company, being very brilliant, are peculiarly adapted to employment in the making of pottery.

70 tons of the same ores were shipped to Antibes in 1892.

The Pertusola output is referred to in detail under the heading of industries.

Agricultural
produce.

Of the agricultural produce, olive oil, guaranteed pure and of excellent quality, could be exported to England from this district with great advantage.

Olive oil for
export.

Enough olive-oil of absolutely pure quality for a complete cargo could be collected in a few days from the landowners, peasant proprietors, and metayers around Spezia, and could be delivered on board in sealed tins at the rate of 3*l.* 4*s.* per cwt., at the rate of exchange of 28 lire per *l.*

In view of the difficulty of nowadays obtaining unadulterated table oil, British dealers in that article would do well to enquire into the matter.

Shipping and Navigation.

The total entries of merchant shipping at the port of Spezia for the past 3 years were given in the official returns as follows:—

Year.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1891	615	27,604	115	79,291	730	106,895
1892	665	35,996	131	83,660	796	119,656
1893	619	31,034	113	100,961	732	130,995

The total entries at Pertusola with cargoes for the Continental Lead and Silver Company solely were:—

Year.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1891	118	5,450	157	41,926	275	47,376
1892	236	6,349	149	43,144	385	49,493
1893	148	6,641	136	41,128	284	47,769

The increase in the total tonnage of shipping is due to the increase in British shipping, which forms a large percentage of the whole, British entries for the 3 years being:—

Year.					Steam.	
					Number of Vessels.	Tons.
1891	..	..	..	..	33	31,292
1892	..	..	..	..	29	33,553
1893	..	..	..	..	44	54,069

These numbers do not include British shipping entered at the harbour of the Lead and Silver Works of Pertusola in the east bend of the gulf.

The entries here were as follows for the same period :—

					Steam.	
Year.					Number of Vessels.	Tons.
1891	..	..	..	..	9	11,814
1892	..	..	..	..	9	10,756
1893	..	..	..	..	13	14,542

Thus showing a total of British shipping of—

Total British shipping:

					Steam.	
Year.					Number of Vessels.	Tons.
1891	..	..	..	..	42	43,106
1892	..	..	..	..	38	44,809
1893	..	..	..	..	57	68,611

The explanation of this increase has been given under the head of "Imports."

The above totals of British shipping given by the local official returns comprise 47 steamers of 59,396 tons register, with cargoes of coal and coke ; 3 steamers, 3,288 tons, with 4,868 tons of wheat from South Russia ; 1 steamer, 870 tons register, 1,378 tons of pitch from Liverpool ; and 7 steamers of the General Steam Navigation Company of London, remaining less than 48 hours in port, and, therefore, not entered on the Consular registers.

The cargoes of the latter 7 steamers consisted of 641 tons of lead and silver ores, 148 tons of anchors and chains for the dock-yard, 17 tons of machinery, and a gun of 24 tons also for the Royal Navy.

All these steamers left in ballast for other Mediterranean ports, with the exception of the 7 last, which, as usual, cleared with the remainder of cargo for Leghorn and Naples.

Coal freights from Cardiff varied during the year from 5s. per ton to 7s. per ton. Present freights from Cardiff are at 6s. 6d. per ton.

Coal freights.

From Newcastle they never rose above 6s. 3d. per ton.

The returns of Italian shipping give the following figures entered during 1893 :—

Italian shipping.

	Sailing.		Steam.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Spezia	614	29,360	59	34,183
Pertusola	148	6,641	123	26,586
Total	762	36,001	182	60,774

Making a grand total for the Gulf of Spezia of 944 vessels, 96,795 tons register.

The corresponding figures for 1892 were:—

	Sailing.		Steam.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Spezia	661	35,314	66	45,537
Pertusola	223	5,932	140	32,388
Total	884	41,246	206	77,975

Making a grand total for the Gulf of Spezia of 1,090 vessels, 119,221 tons register.

These figures show a considerable falling-off in Italian shipping for the year, specially attributable to the smaller amount of Sardinian ores imported to Pertusola and also to a falling-off in the coasting trade.

Other shipping is insignificant.

Other shipping.

The petroleum fuel from Batoum was imported solely under the Italian and Greek flags; timber under the Scandinavian flag.

Coasting trade.

The "cabottaggio" or coasting trade in this district comprises the "Navigazione Generale Italiana" service from Sardinia to Pertusola and from Spezia to Naples and Palermo. There is also a Pertusola-Genoa service in connection with the Pertusola Works.

The small "cabottaggio" in feluccas is considerable owing to the absence of road communication for a large number of the sea coast villages.

Port dues.

There have been no changes in port dues and other expenses—

Description.		Amount.	
		Lire	c.
Gratuity to custom-house and sanitary officers ..	..	10	0
Interpreter at the health office	..	5	0
Custom-house formalities, fees	..	29	35
Bill of health	..	5	0
Hire of baskets	Each ..	3	50
" shoots	" ..	4	0
Pilotage in and out, mooring and unmooring ..	..	100	0
Agent's commission	..	125	0
Water	Per ton ..	5	0
Anchorage dues	" ..	1	0
Discharging cargo—			
Coal	..	0	65
Grain	..	0	60
Timber	Per ton ..	1	0
Sanitary fees have been abolished.			
Weighing cargo, if required	Per ton ..	0	20

NOTE.—The sums are all paid in Italian lire, therefore English equivalents have not been given as they may vary considerably with the fluctuations of the exchange.

Population and Industries.

No iron shipbuilding of any importance is now carried on at Ship-
Spezia out of the Royal Dockyard since the abandonment in 1891 building :
of their unremunerative attempt at shipbuilding by the Continental Iron ship-
Lead and Iron Company of Pertusola, which had to be given up building.
owing to the impossibility of competing with Great Britain
and the old-established Italian firms on account of low prices
obtaining in recent years.

In the maritime district of Spezia, which extends from Wood ship-
Sestri Levante to Avenza, there are a few yards where the smaller building.
sort of craft in wood are built.

The dockyard of Italy's first military harbour has naturally Royal
been very busy, but, owing to the excellent condition of Italy's dockyard.
naval material, comparatively few repairs were required, notwith-
standing the fact that almost the entire naval strength of Italy
went through heavy work at sea for several months during the
summer of 1893, and that a squadron of 5 cruisers had been kept
in commission on the Atlantic coast of North and South America.

The economies rendered necessary by the reduction on the
naval budget have somewhat interfered with the progress of the
shipbuilding in hand in the Spezia Dockyard.

The armoured cruiser of 6,500 tons, "Carlo Alberto," and the
torpedo cruiser "Calabria," of 2,280 tons, are making fair progress.
The latter will be launched in 1895 completely engined.

The first-class battleship "Sardegna," of 13,251 tons, is
approaching completion, has already done very successful steam
trials, and gives promise of attaining the remarkable speed
of 21 knots, with engines made at Genoa, but under the direction
of an English engineer.

Finishing touches are being given to the armament of the "Etruria" and "Liguria," sister ships to the "Calabria," 2,250 tons, and the extensive alterations to the second-class battleship "Maria Pia" are nearing completion.

Dockyard
reforms.

Extensive administrative reforms are being carried out, some sinecures abolished, and among the dockyard workmen a good number of old hands pensioned off.

As a matter of economy the vacancies by death or retirement have not been filled up by any new admissions, but, as a rule, from the lower ranks by competition and selection.

Holidays.

The number of non-working days or "festas" in the year has been increased to 70, otherwise the dockyard hands, in the matter of wages, have not been made to feel the effects of the economical crisis.

Dockyard
schools.

Considerable interest, from the social and industrial point of view, are the very satisfactory results of the "Scuola Garzoni" (school for apprentices), some years since instituted in the Royal Dockyard.

The lads, sons of dockyard hands principally, are drilled and given an excellent primary education, in addition to being taught one of the dockyard trades. The discipline thus instilled and the study of their particular trade from early youth greatly benefit the workman in time evolved by selection. The advantage of the discipline is twofold; it is a benefit to the workman and to the Government. The system would also appear to be the best antidote to the poison of Anarchist propaganda, and ensures reliance on dockyard work in times of emergency.

Larini,
Nathan and
Co.'s iron-
works.

The Spezia branch of this Milanese engineering establishment is now under the direct management of M. Edward Nathan, son of the English partner of this firm of engineers, founders, and boiler makers.

In 1891 the company purchased the buildings and the plant of the neighbouring ironworks and shipbuilding yard of B. Batfeco and Co. for a very moderate sum.

The works are situated in the north bend of the bay, close to the new commercial harbour, and are now connected by rails with the Spezia-San Bartolomeo Dockyard Railway.

The works have a sea frontage of about 300 metres, and cover an area of 17,640 square metres, on which stand four blocks of buildings, consisting respectively of boiler-maker shop, with mould loft on second floor, smith's shop, fitting and erecting shop, foundry, pattern shop, stores, and mould loft with painters' stores, mast makers, &c., below. The remaining area of 12,685 square metres serve as ship-yard, erecting-yard, &c.

The mean number of hands employed in the boiler-making shop during 1892-93 was 130; all Italians, with the exception of 1 Austrian.

They worked 10 hours a day, with an average daily wage of 3 lire. In the fitting and erecting shop, 40 hands, average wages 3 lire 20 c.; foundry, 30 hands, wages 3 lire 50 c.; pattern and mould-shop, 5 hands, wages 3 lire 50 c. In addition to the above

an average of 14 shipwrights at 2 lire 80 c., and about 25 labourers at 2 lire 50 c., were also employed.

During the two years ending December 31, 1893, the firm imported the following material :—

Articles.	Italian.	British.
	Tons.	Tons.
Soft steel and wrought-iron ..	300	850
Pig-iron	50	650
Gun-metal	15	..

The chief work turned out during the same period consisted of tugs, barges, buoys, dredgers, and repairs to the same, for the Italian Navy; railway steam and hand-cranes, turn-tables, switches, and crossing-gates and signals; iron and steel-bridges, and also a hydraulic swing railway-bridge, for the Spezia-San Bartolomeo Dockyard Railway.

The works also turned out iron roofing for railway stations and mills; boilers, tanks, conning-tower apparatus and hydraulic plant for Italian men-of-war, torpedo-boats, and Government shops, and sundry iron and brass castings.

The Pertusola Works have been extensively referred to under several heads in this report. I may add here some general remarks on the nature of these lead and silver refining works. 360,000*l.* of British capital are engaged in the works, which occupy 850 hands, whose wages vary from 2 lire 50 c. to 4 lire 50 c., working 10 hours a day.

About 400,000*l.* value of ores were smelted during 1893. This consisted of 33,159 tons, the origin of which is given under the head of "imports."

The following materials were used in the refinery during 1893 :—

Articles.	Quantity.
Coal.. .. .	Tons 15,000
Coke	" 8,000
Bricks	Number .. 25,000
Zinc.. .. .	Tons 300
Iron.. .. .	" 400
Iron slag	" 6,000
Bone dust	" 10

The output for the year consisted of :—

Articles.	Quantity.
	Tons cwt <i>s.</i> lbs.
Soft lead	19,498 0 0
Antimonial lead.. .. .	400 0 0
Silver	40 0 0
Gold	0 25 82

The firm cast their own iron pots and tools, and use a steam-power hammer to make their own iron crucibles.

Started originally by a French Company, the works were purchased by Messrs. Charles and George Henfrey, highly esteemed and well-known Indian engineers.

The original plant was somewhat deficient and the plan of the works not laid out with a view of saving labour. Under the management of the Messrs. Henfrey the works soon became a very lucrative undertaking, bringing in on the average 14 per cent. profits.

Six years ago the undertaking was turned into a limited liability company under the title of Continental Lead and Iron Company, Limited, with a capital of 360,000*l.*, in which Lord Brassey became principal shareholder.

The attempt to add shipbuilding to the refinery proved unsatisfactory, owing, as has been said, to the impossibility of competing with British, or other Italian firms, at the low prices then running.

The shipbuilding was given up after the completion, at a loss, of the ships in hand, and every attention was then given to improve the output and diminish at the same time the working expenses of the refinery.

A judicious reduction of staff and a readjustment of the process to economise labour; the installation of flues running several hundred yards up the hill at the back of the works, in order to retain a part of the silver which had previously been wasted, and the setting up of the two largest cast-steel blast furnaces in existence, having a diameter of 6 feet 6 inches, and a height of 23 feet; added to the selection of richer ores, have enabled the company to keep the works going. I have, however, every reason to believe that true philanthropy has entered considerably into the considerations that have weighed with the Company in deciding to keep the works going instead of closing during the continuance of the crisis in lead and silver.

The distress among the 700 families living in the neighbouring villages who are supported by the Spezia Works, and the still larger number living on the mines of the Company in Sardinia would be sad to contemplate, were the firm to cease working. Every effort is being made to improve the output; but though the wages paid to the miners no longer permit of working the mines at a profit, the Company have not followed the example of their neighbours in cutting down wages to a starvation point.

The cessation of the shipbuilding caused great distress, but every man on being discharged received a sufficient gratuity to enable him to live while seeking further employment, and natives of other parts of Italy were sent to their homes at the expense of the Company.

The process of the refinery is somewhat different from that adopted at home. It consists of:—

1. The roasting and flowing furnaces.
2. Blast furnaces for the production of impure lead.

3. Refining of impure lead with production of antimonial lead.
4. Desilverising of the pure lead by addition of a percentage of zinc.
5. Refining of desilverised lead and production of market lead.
6. Distillation of zinc, silver, and lead alloy for the recuperation of zinc with the production of "rich lead."
7. Heating of rich lead for the production of pure silver in bone-dust crucibles.

The silver containing gold is sent to Germany for the separating process.

Messrs. Pirelli and Co.'s Submarine Cable Factory, of Spezia, covers 8,000 square metres of the eastern foreshore of the Gulf between the new harbour works and the dockyard and torpedo depôt of San Bartolomeo. This firm, the first to start a submarine factory on the Continent, have contracted to lay and keep in repair all the cables of the Italian Government for a period of 20 years, dating from 1887.

Pirelli and
Co.'s Sub-
marine Cable
Factory.

The works can turn out 6 miles of submarine cable and the same quantity of underground lead protected cable per day.

The steamer "Città di Milano," of 1,300 horse-power, built in Great Britain for the Company, can carry 310 miles of cable of medium diameter, and is by special arrangement officered and manned from the Royal Navy. The firm employ an English navigating officer, Captain in the service of the Eastern Telegraph Company, who has command of the ship during the laying and re-pairing of their cables.

The total work turned out by the firm has been :—

Description.	Number of Miles.	Total Weight.
Submarine electric cables.. ..	1,300	Tons. 3,260
Underground cable with lead covering	130	120
Overhead wires	70	110
Various	30	50

Of the material employed, copper, iron, and steel wire were purchased partly in Italy, partly in Germany, and in England. Brass ribbon in England; gutta-percha in London, Hamburg, and Singapore; pitch in London and Norway; the jute, hemp and cotton material in Italy, and the lead from the Pertusola Works.

The isolated conductors, consisting of seven copper wires surrounded with gutta-percha, are made by the Milan branch of the same firm where over 400 tons are annually turned out by them.

The cables are of three sizes, similar to those made in England.

The Carrara Marble Industry.

The Carrara marble industry dates from the Etruscan days when the town of Luni, situated between the Rivers Magra and Arno, was the origin of the industry.

(1729)

D 3

Carrione (the latter of which flows down from the quarry streams and through the now flourishing town of Carrara), was the great emporium of the Apuan marbles, and was built of the produce of the quarries.

From the last century of the Roman republics up to the invasion of the Goths these quarries prospered; and again from the 11th century to the present day the industry has flourished.

Carrara, Massa, and Serravezza are now the centres of this important industry.

Ports of
shipment.

Carrara itself lies 3 miles from the sea, and is connected with the main line of railway by a branch at Avenza. The "Marina d'Avenza," its port, whence the marble is carried in sailing vessels to Genoa and Leghorn, is the principal deposit of block and sawn marble; but owing to its being an open roadstead the marble can only be shipped in fair weather, the ships having to run into Spezia for protection in heavy weather. Hence the probability that the new harbour of Spezia, in direct communication with the quarries by rail, will again become as in past times the loading port for all the Carrara and Spezia marble.

The quarries are so situated against the sides of the mountains that the blocks of marble must be brought down by huge cables from the quarry to the cart road on primitive sleighs held by cables along slides not exceeding 45 degrees, an operation fraught with great danger. Each quarry is worked according to its own peculiar formation, blasting not always being necessary.

Water power.

With few exceptions the saw mills are run by water-power, and every available point on the small mountain streams is utilised; but often for several weeks in the summer when the little water there is is turned off for agricultural purposes, the mills have to suspend work.

Primitive
processes.

The most old fashioned processes are still in vogue. The introduction of labour-saving machinery would be resented as ruinous to the interests of the working man.

Marble
railway.

Formerly, all the marble was brought down on carts drawn by oxen, often as many as 10 pairs and 15 pairs being used. In May, 1890, the "Marmiifera" or marble railway, comprising in all its branches about 10 miles, and extending from the principal quarries to the sea, was completed after nearly 10 years' work. There are 14 tunnels in this difficult piece of engineering, the longest of which is 4,000 feet, connecting the valleys of Fantiscritti and Ravaccione, and was found to be good marble in its entire length. The grade varies from 22 feet in 1,000 to 60 feet in 1,000, and its highest point is about 1,500 feet above the level of the sea. The largest block that can be carried on one car is 38 tons.

Tonnage
carried.

In the year 1891 the total tonnage carried reached only 103,000 tons, but under the successful management of the director, Signor Giovanni Conti, it was estimated to reach 150,000 tons, with gross earnings of about 35,700*l*.

Cost of line.

The total cost of the road is said to have been 285,700*l*, and is the property of a private company.

English and
American
dealers.

A large percentage of the Carrara business is at present in the hands of English and American dealers.

Recently an attempt has been made by a syndicate to purchase ^{Proposed} all the principal quarries, the object being to control the entire purchase by ^{syndicate.} output. Options, said to reach 71,400*l.*, have been taken. It is thought that at least 21,500*l.* more would be required to work the quarries, while many claim that the entire sum would reach 128,600*l.* or 142,800*l.*

Competent men in the trade make this estimate of the scheme. ^{Estimates.} Placing the total output of the quarries, which could be obtained at the generous figure of 200,000 tons, one finds the gross receipts of such a company to be about 21,500*l.* on 107,100*l.* capital, not counting any reduction in the value of quarries worked.

Experienced quarry owners say that the net earnings could not reach 2 per cent. on such investment.

The above figures are given for what they are worth, but only one conclusion can be reached from them, that the price of marble must be advanced.

There seems no place for so large a company to make permanent and profitable investment with the present demand for marble, but, at the same time, a company embracing several of the larger firms with a much smaller capital could be made to render a fair dividend; and this probably will be the end of the present movement.

From 1888 to 1892 the trade in marble has felt the general ^{Continued} depression in business, and had for some years before that already ^{depression in} been considered less profitable than it used to be. ^{trade.}

During 1893 the trade in marble was worse than ever, and prices on the decline, owing to the general depression.

The high tariffs on sawn marble, which have during the last ^{High duties} few years been imposed by almost every nation except Great ^{on sawn} Britain, had a very detrimental effect on the sawn marble ^{marble.} trade. Heavy duties still continue to be levied on marble in most countries, and Spain has now followed their example, and by this system of protection closed her market to the Carrara sawn marble.

The consequence is that the block trade increases, while the slab trade gets worse. Many mills that were working full time up to 1884 and 1885 are now closed. In Massa the distress is especially felt, where three or four firms only are practically doing any work.

The recent McKinley tariff in the United States of America ^{The McKinley} has also done considerable harm to American trade. ^{tariff.}

During 1893 America, as usual, took the bulk of the marble. ^{Distribution,} Great Britain and her colonies come next. The United States ^{1893.} Government has, in consequence of this rapid development of American commercial interests in the district, appointed a Consul to Carrara, whose services are, however, principally required in connection with the export trade of monuments, for which there is a growing demand in the United States. Of the British colonies, ^{American} Australia comes in for a large proportion of the export. ^{trade and} ^{Consul.}

The exportation of sawn marble reached, in 1891, about 70,000 tons; manufactured marble, 6,000 tons; and block marble brought the total to 160,000 tons.

15 years' exportation. For the 15 years from 1877 to 1891 inclusive 2,106,978 tons of all grades were exported, beginning with 111,000 tons in 1877, and reaching the maximum of 162,000 tons in 1890.

Spain, prior to new duty. During 1893 the exportation to Spain was very heavy; in order to land it before the new duty came into force, 10,000 tons were shipped there within a few weeks.

Total output. The total output for 1892 was 59,000 tons of sawn and manufactured marble, and 133,000 tons of block marble.

The total annual output from all the quarries varied from 150,000 to 180,000 tons during the last decade.

Prices. The average prices of veined and white marble have decreased 10 per cent. on the prices of the last few years. The value of statuary marble has not changed.

Hands employed. The number of hands employed in the block and slab output at Massa and Carrara is estimated at 6,000 hands, and 3,000 to 4,000 more are employed in the monument trade. The quarryman's average pay varies from 3 lire to 3 lire 50 c., but the carters, who have a rough share of the work and toil up and down the mountain-side, as well as the hand-sawyers, who work in all weathers, are paid only 2 lire a day.

In Carrara and the neighbouring villages at least 60,000 people are either directly or indirectly dependent on the marble industry for a livelihood.

The people of Carrara are industrious but none too frugal, kind-hearted and generous, and without doubt the finest marble-workers in the world.

The average wages of marble-workers, even including sculptors, will perhaps fall below those of the quarrymen, because of the employment of many boys for the less difficult work.

At least two generations must pass before statuary can be made in any other country as cheaply as in the Carrara district, although prices and wages are constantly advancing owing to increased demand.

Carvers. The carvers are required to spend from 8 to 10 years in the Academy of Fine Arts, which is one of the best in Europe under Government control, and the better workmen do not find it necessary to emigrate. The work executed is generally cemetery

Tombs-stones and sculpture. work, but copies of the great masters are frequently made. Many first-class artists come out of the Academy at Carrara, and even in the ordinary workshops highly competent sculptors are to be found.

The bulk of the monument trade goes to Great Britain and Australia, but American trade has run British trade in monuments very close of late years, and is now probably equal to it.

Of important works of art that have been exported lately may be mentioned the sarcophagus for the late German Emperor Frederick, and a monument to the firemen who lost their lives at the great fire in Cuba a few years ago.

Pietrasanta and Serravezza. Pietrasanta and Serravezza, a few miles south of Massa, are both in the province of Lucca, but I may mention here that at Pietrasanta, which has hitherto only dealt in inferior articles of

sculpture, on account of the low cost of labour difficult works are now also executed.

Serravezza has the Breccia quarries, the famous statuary quarry of the Altissima mountain, a few white marble quarries, as well as the dove-marble quarries. The statuary quarry is owned by a French firm, and is said to be the best statuary marble quarry extant. It is devoid of blemishes, and fetches the high price of from 30s. to 35s. per cubic foot, and is the only kind (with the exception of the Greek, perhaps) that can be safely used for making large statues. The Breccia marble is composed of angular fragments of coloured marble intermixed with minerals, and, although very hard to work and polish, looks very handsome when turned for columns or used for panels. Colours and qualities.

Excellent coloured marble can be obtained in the Gulf of Spezia from the quarries of Porto-Venere, Coregna, and Biassa. The exquisitely-beautiful Portoro, black and yellow; Coregna, red, black, and white; Biassa, red and yellow, are carted in rough blocks to the Spezia station and carried by rail to the Carrara mills, where it is cut and sawn. The transport thus increases the cost of these marbles over-much. Spezia coloured marble quarries.

Reasonable profits are, however, made on the Portoro quarries, the only ones of any importance in the district of Spezia. Portoro marble.

This beautiful black and yellow marble is much appreciated in Russia, Holland, and Germany, especially for church columns and altar decorations. Considerable quantities of it were shipped to Great Britain in former years, but the yield is no longer as good as formerly. The veins of the marble go perpendicularly into the body of the mountain, and as the marble is too brittle to allow of quarrying by gunpowder and dynamite, and the mass of surrounding granite to be removed before it is reached increases annually owing to the formation of the marble veins, the cost of removing becomes yearly greater. The bulk of it appears to lose in quality as the depth of the quarry increases.

However, a remunerative amount of fine blocks will probably be at hand for some time to come.

This quarry is the property of the municipality, but has always been worked by the same firm, who now find it more profitable to ship the blocks whole to foreign countries where it is worked.

About 200 tons have been annually quarried, and sold at 6*l.* per ton if inferior in quality, and 10*l.* per ton if of superior quality.

It is a hard marble and is hard to work as it is apt to break too easily, but takes a remarkable polish.

Small quarries of a dark red, black spotted marble are being worked at Levanto, mostly carried by rail to the Carrara work-shops. Levanto marble quarries.

It has been much used in Italy for church columns. About 100 tons were sold during 1893, the price being half that of the "Portoro."

The leading British firms at Carrara are Messrs. Walton and Carrara firms in the marble trade.

Nephew : Odling ; Robson and Sons ; and at Massa, the Massa-Carrara Marble Company.

Many other firms have only agents at Carrara in order to avoid local taxes, but this is to be regretted in the interests of British trade.

I am indebted to Mr. Sennet and Mr. MacFarland, the secretary and the treasurer of the British and American Clerks' Association, for the greater part of the above information respecting the Carrara marble industry.

Spezia
sandstone
quarries.

The Spezia sandstone quarries give an excellent stone for the pavements of roads, sidewalks, courtyards, &c.

The stone is remarkably soft on being quarried and is easy to work, but soon becomes very hard on exposure. The bulk is exported via Genoa to South America.

Massa cotton-
printing
factory.

There exists at Massa a cotton printing factory, doing business on a large scale. A steam tram connects the factory with the Massa Railroad Station.

The factory is built near the source of the "Frigido," and obtains its water power from that stream.

Sarzana
glassworks.

Mr. Giacomini's glass works at Sarzana are rapidly extending their business. The works are now the largest of the kind in Italy and employ 600 hands.

Three large furnaces on Siemen's system, produce 30,000 bottles per day and work 9 months in the year, producing annually 8,400 tons of glass bottles and demijohns. The works consume 10,000 tons of British coal and 2,000 tons of sulphate of soda, principally obtained from England.

Sarzana brick
factories.
Patent fuel
factory.

The Sarzana brick factories supply the local building trade.

Messrs. de Michele and Raggio's patent fuel factory works principally for the Government. They transform all the coal dust left on the hands of the Royal Dockyard, and about 6,000 tons more imported by them, into fuel bricks for the Navy, the War Office, and Royal Civil Engineers Corps.

For the manufacture of these bricks about 2,000 tons of coal-tar are imported from Great Britain annually.

Labour and Trade Disputes.

Strikes and
trade disputes.

There have been no actual strikes for the past 2 years in Spezia. All disputes that have arisen between employers and employees have been settled, as a rule, by arrangement between the employers and a representative committee of the employed.

The tribunals of commerce were suppressed 4 years ago, and all commercial disputes are settled by reference to the "Conciliatore" judge, if the sum in dispute does not exceed 100 lire ; by the "Pretore" if it exceeds 100 lire and is under 1,500 lire ; and for matters affecting sums of over 1,500 lire, by the "Civil Tribunal."

Arbitration.

No arbitration or conciliatory boards are in existence. An "arbitration law" and a law on the "relief of workmen in distress" are in contemplation.

One attempt at a strike for higher wages was made in the autumn of 1893 by the workmen of Messrs. Larini, Nathan and Company, at the moment when the firm had undertaken considerable contracts for the Navy. It ended in ignominious failure by the instant dismissal of the leaders known to have professed Anarchist doctrines.

Anarchist agitators were also responsible for the strike at Pertusola 3 years ago when the blast furnaces were blown out. The movement was stopped by the energetic action of the American manager, who summoned the police and with their help instantly dismissed the leaders.

These being found to be Anarchists from other parts of Italy were sent under police escort to their homes at the expense of the Pertusola Company, much to the satisfaction of the great majority of the workmen who realised that they were receiving good wages and were fortunate in possessing permanent employment in very hard times.

The recent grave disturbances in the province of Massa-Carrara cannot be considered as the result of labour disputes, or as being due to economic causes.

Differing in their origin from the disturbances in Sicily, the Carrara riots were the result of Anarchist propaganda, the work of proselytising being found only too easy. The social and political causes that led to the deliberate and organised rebellion against constituted authority, cannot with propriety be dealt with in a trade report.

The quarrymen of Carrara are on the whole fairly well paid, generally work but 5 days in the week, and in most cases have employment all the year round.

The expenditure of much energy, and considerable exposure and risk are unavoidable, and the resort to alcoholic stimulants in consequence is but too general.

Life in the surface quarries of Carrara is not unhealthy in itself, but the risk of getting maimed is great and may be estimated at about 6 per cent. No lives are ever insured.

Doubtless the condition of the quarrymen, though superior to that of their fellow labourers in many parts of Italy, is still open to considerable improvement; the lower class of labourers who may be said to have the hardest work are, perhaps, the worst paid, and it is to be hoped that the work of restoring order will be followed by reform in the existing relations between quarry owners and workmen; by the creation of benevolent institutions now conspicuous by their absence in the district, by the better housing of the working classes to combat promiscuous overcrowding, dangerous to hygiene and morality, and by the institution of workmen's insurance against accidents, to which by the nature of their occupations the marble quarrymen of Carrara are peculiarly liable.

Population.

The district under the supervision of the Sub-Prefect of Spezia forms part of the province of Genoa. It consists of the southern-

The district
of Spezia.

most portion of the ancient province of Liguria known as the Eastern Riviera.

Hemmed into a narrow compass between the Apennines and the sea it stretches southwards from the district of Chiavari (also in the province of Genoa) up to Amelia at the mouth of the Magra River, where the district of Spezia confines with the province of Massa-Carrara.

The latter province, part of ancient Tuscany, is under the supervision of a Prefect residing at Massa, and derives its only and unique importance from the world-famed marble quarries of Carrara.

The Sub-Prefecture of Spezia comprises 29 communes, of which, besides Spezia, the neighbouring ancient town of Sarzana, seat of the Bishopric and of the Civil Tribunal for the district, is alone of any importance.

The remaining 27 communes are either small fishing villages in greater part nestling under the cliffs, whereof Levanto, also a summer bathing resort, Porto-Venere and Lerici, rendered famous by Byron, Shelley, and Lever, are best known to and visited by tourists; or villages picturesquely perched on some of the innumerable hills that stretch from the Spezia coast eastwards to the Apennines.

The population of the district of Spezia at the census of 1881 numbered 109,390 souls; Spezia alone coming in that date for 31,565 inhabitants. While the other communes of the district remained stationary, the population of Spezia continued to increase in a remarkable manner. In 1889 the official census returns gave it as 44,342, and at the municipal census of January 1, 1894, it was found to exceed 52,000 souls.

Province of
Massa-
Carrara.

The province of Massa-Carrara has a total population of 181,000 divided into three districts; those of Massa-Carrara proper, 100,038; Castelnuovo di Garfagnano, 43,236; and Pontremoli, 37,737.

The suppression of the province of Massa-Carrara is only a matter of time. Its largest town, Carrara, has a population of only 23,000 inhabitants, far below that of Spezia; and the seat of the Prefecture, Massa, itself has a population smaller still.

The proposed plan of detaching the Sub-Prefecture of Spezia from the province of Genoa and of adding to it the districts of Massa-Carrara and Pontremoli, both of which have their natural outlet down the Magra Valley by the Parma-Spezia Railway from Pontremoli, where it emerges from the Borgallo tunnel in the Apennines, down to the new commercial harbour of Spezia, would, if adopted, reduce the population of the province of Genoa to 677,000, and make Spezia the capital of a province numbering about 270,000 inhabitants.

The district of Castelnuovo di Garfagnano, third district in the now existing province of Massa-Carrara, and having a population of 43,236, is separated from the remainder of the province by the great Carrara range, and would in all probability be attached to the province of Lucca where the Garfagnano Valley has its natural outlet¹.

Geographical, commercial, and political reasons alike single out A new Spezia, now the principal military port and dockyard of Italy, as province. the centre of the new province, and its magnificent harbour as the most convenient outlet for the agricultural produce of Bologna and Parma, and the marble from the quarries of Carrara.

With the opening of the last section of Parma-Spezia Railway during the approaching spring, and the completion two years hence of the new harbour works, now in full progress, must inevitably come the removal to Spezia from Genoa and Leghorn of a not inconsiderable portion of their trade with Southern Lombardy and Emilia. It is estimated that within 2 years the trade of Spezia in coal, sulphur, cereals, wine, iron, cotton and hemp will already exceed that of Savona.

Changes in the municipal boundary of Spezia are expected before long, in order to remove the many existing anomalies which are a source of considerable discontent. To state only one instance: the east half of the harbour comprising the great Torpedo and Electrical Station of San Bartolomeo, the Muggiano testing ground, the extensive works of the Continental Lead and Iron Company, Messrs. Pirelli and Co.'s Cable Factory, &c., do not come within the municipal boundary of Spezia, but belong to a small village some miles distant on the hills where the inhabitants of this suburb of Spezia have to repair for all municipal purposes of registration and taxation, and which has remained as small and insignificant as was the fishing village of Spezia 30 years ago. Municipal boundary changes.

The removal of the Civil Tribunal to Spezia from Sarzana, which is half-an-hour distant by rail, is another matter of urgency The Local Tribunal. called for by the fact that the population of Sarzana is now quite insignificant compared to that of Spezia, and that the latter town comes in for an overwhelming proportion of the cases sent there for trial.

The local press unanimously attribute many of the evils from which this town is now suffering to the incapable administration of past municipalities, which rendered necessary the dissolution by Royal decree of the Town Council and the appointment of a Royal Commissioner to administer municipal affairs for two separate periods of 3 and 6 months respectively within the last 3 years. Municipal administration.

By reforms and economies judiciously enforced Cavaliere Mario Rebutti, Royal Commissioner, was able to transform a deficit into a surplus during the latter half of 1893.

Public Health.

No fault can be found with the climate of Spezia. It is as near perfection as possible, and in many respects surpasses the climate of the Western Riviera. Climate of Spezia.

The old town suffers from the defect of most Continental cities—imperfect drainage. This does not, however, seem to affect the general health, as the mildness of the climate permits of an open-

air life, and the town is all the year round swept by the beneficent sea breezes, or by the pure air from the Carraras and the Apennines. The evils of the system have been frankly acknowledged, and the municipality are now studying the proposal of a French firm for a complete new system of drainage on the Lieurnur principle.

Mortality.

Mortality during the past year has been very low, and the general health, until the winter epidemic of influenza, remarkably good on the whole.

Water supply.

The water supply of Spezia, both abundant and of good quality, obtained from several mountain sources, is in favour of the town; and to that fact, added to the thoroughly practical and efficient measures of precaution adopted by the Royal Commissioner, Cavaliere M. Rebucci, the acting mayor, aided by the naval authorities, may be attributed the complete freedom from the threatened outbreak of cholera, which had spread from Southern Italy as far as Leghorn during the summer of 1893.

The water supply was constantly submitted to chemical analysis; wells tainted with impurities, and thereby proved to be liable to infiltration, were closed; the drains copiously flushed with disinfectants; the streets kept clean, and the market produce submitted to daily inspection during the entire summer.

Rate of wages.

During the year I note no changes in the wages, which remain at the low rates that obtained during 1891 and 1892—that is to say, a reduction of 20 per cent. on the rates prevalent during the 30 years' great expansion of Spezia when dockyard works, military roads, fortifications, and house building were at their height. The completion of the dockyard, of the military and naval defences, and of the elaborate system of roads, as well as the closing of several important ironworks, the completion of the building programme of the municipality of Spezia, by whom 6,000,000 lire were spent in model workmen's dwellings, brought a period of great activity to a close.

Day labourers now cannot obtain more than 1 lire 60 c. to 2 lire per day; masons and carpenters, 3 lire to 4 lire; blacksmiths, 4 lire to 6 lire; glassmakers are better paid, and can get 8 lire to 12 lire.

The working day remains unchanged, that is from sunrise to sunset, a 10 hours' working day being the rule. The 8 hours' question mooted in the prosperous days has not been raised since.

Banks and exchange.

Spezia has only one private bank and a local agency of the Bank of Italy.

High exchange.

Exchange follows the movement of the Genoa money market. The exchange on London rose from 26 lire to 28 lire 90 c. during 1893, remaining at the close of the year at 28 lire. At the time of writing it is again on the rise, and is now 29 lire.

Improvement in business.

The business transacted by the local banks for the past year shows a gradual improvement in local financial affairs, and a return of confidence.

Public Works.

The works of the new commercial harbour, begun in 1891, were for a short while delayed by the death of the original contractor. A Pisa banking firm took over the contract, and very considerable progress was made during 1893. Commercial harbour works.

The dredging was completed during the summer. The main portion of the T-pier has been laid in rough granite, and more than two-thirds of the blocks of concrete for the quay walls have been moulded. Dredging.

The sinking of these blocks is now in progress. The works may be safely expected to be finished in 1896, though the close of 1895 will already find the port working. Building of pier and quay.

The Spezia-Parma Railway, which has cost the Government 4,640,000*l.*, will be opened in its entire length during the coming spring. The delay that has occurred in the completion of this work of such importance from a military as well as a commercial point of view, was in part due to the decision of the Government to have a double line of rails laid, and the consequent necessary enlargement of the tunnel. Delay was also caused by the nature of the geological formation of the Borgallo mountain, through which runs the principal tunnel of 5 miles in length from Pontremoli to Borgotaro. Spezia-Parma Railway. Cost of railway. Cause of the delays.

The brittle character of the limestone, and the masses of water met in the course of the tunnelling, necessitated special engineering works to support the tunnel roofing and carry off the water. Engineering difficulties.

This railway is now practically finished and the lines are being laid through the tunnel.

The building of a line from Aulla, which lies half-way between Spezia and Pontremoli, up to Lucca has been decided upon. The military value of the line is its principal recommendation. Aulla-Lucca Railway.

Spezia will by it be placed in connection with Tuscany without resorting to the exposed Spezia-Pisa coast line railway.

The Spezia-San Bartolomeo Railway is an extension of the Royal Dockyard Railway system along the foreshore of the bay, placing the dockyard in communication with the San Bartolomeo torpedo and electric depôt; a distance of 3 miles. Dockyard Railway. Spezia to San Bartolomeo.

The line was built by the Royal Engineers Corps, and opened in January of the present year for the use of the San Bartolomeo dockyard workmen and employés as well as for the transport of material.

The works of Messrs. Pirelli and Co. and Messrs. Larini, Nathan and Co., which lie between the railway and the shore, have been put in connection with this line.

A narrow gauge railway has also been built by the Royal Engineers, connecting the San Bartolomeo establishment with the navy ammunition depôts, the guncotton and powder magazines of Val di Lecchi. It also connects with two very substantial new piers, one for the ammunition, the other for naval provisions, built out into the east side of the bay. Narrow gauge Ammunition Railway.

The piers are fitted with double line of railway and several

hand-cranes, and are in telephonic communication with the Val di Locchi and San Bartolomeo ends of the line.

Special cars have been built for the conveyance of ammunition.

General Remarks.

Co-operation. Italians are undoubtedly proficient in the art of co-operation, inherited from the older portion of the present generation who learnt its value in the days of Italy's glorious struggle against political oppression, a legacy that should cause no surprise to the students of the history of Italian Unification.

Co-operative societies. That the Italian working man understands the full value of co-operation is proved by the existence of innumerable mutual help societies, co-operative workmen's societies and supply associations. The co-operative society of masons and stone cutters at Spezia has been fairly successful—it has a membership of over a hundred and a working capital of about 500*l*. It has obtained contracts and has given satisfaction in carrying them out.

Society of masons and stone-cutters.

These societies are regulated by Royal decree of August 23, 1890, approving the law of July 11, 1889, on "Contracts of co-operative societies of production and labour," and are authorised to bid for private and Government contracts. If the social capital does not exceed 1,070*l*., those societies are exempted from the registration taxes usually amounting to 4·8 per cent.; the annual certificate to this effect is granted by the Prefect or Sub-Prefect of the district.

Value of combination. Combination such as the above between working men or between producers, can but be a boon to the employer and employed, to the consumer and producer alike. With the help of the public press as a cheap advertising medium, labour and capital would find mutual profit by avoiding the middleman and the contractor.

By this means the small and now neglected secondary products of the farm might also be made a source of profit not to be despised, as instanced by the Eynsford village association for the supply of dairy and poultry produce for the London market.

Co-operative supply stores among workmen. An interesting instance of the advantage of co-operation may be found in the "Co-operative Supply Association among Wage-earners," whose object is to procure for its members groceries and other articles of food at cost price.

I may be permitted to give here a short summary of the constitution of one of these societies which I have enquired into and which I find is doing good work in one of the neighbouring villages.

The principal articles of association, drawn up, it must be borne in mind, by working men, begin with the following exordium:—

"Under the impulse of civil progress, praised in our times, a co-operative society among working men is hereby instituted with the object of distributing among its members articles of food at the wholesale cost price." Only active members, having equal

rights and equal duties, of well-known respectability, can belong to the society; each member contributes towards the social capital by a subscription of 50 lire to be paid in fortnightly instalments of 5 lire. The prices to be paid by the members for the goods are settled by the managing committee at a rate sufficient to cover the expense of administration and the rent of the premises.

A member can pay in cash on purchase or settle fortnightly. In the latter case he can only obtain credit for two-thirds of the sum paid by him towards the formation of his share. No member can open a shop on his own account. The members select a new president, treasurer and secretary at a general meeting held on the last but one Sunday of each quarter. Numerous rules are elaborated to prevent fraud and ensure the easy working of the organisation. The stores are paid for to the wholesale merchant only when consumed, spoilt goods being returned. The benefit to the working-man from such a society is obvious.

An institution calculated to render great services to the British and American clerks at Massa, Carrara and elsewhere deserves special mention. British and American Clerks' Association.

Started at Massa by the British and American residents employed there and at Carrara in connection with the marble quarries, this association supplies a great want, and evidently has before it a career of great usefulness.

"The aim of the association is to minister to the comfort, the material, mental and moral benefit of British and American clerks."

It insures the lives of its members against railway accidents. Life insurance.
It helps members to find a situation when they are in want of one, or to obtain a change of employment. Search of employment.

It furnishes them with a membership card of the association for the promotion of home and foreign travel which entitles them to a discount of 15 per cent. on the bills of nearly 2,000 first-class hotels. Cheap trade.

It sells them books at 30 per cent. discount and supplies them with British magazines and newspapers at twopence in the shilling discount. Literature.

It obtains for them articles of British manufacture at a very low rate, and brings out for them articles of British manufacture under usual cost. It forwards newspapers at usual cost, but manages detail and gives to members information on any subject at any time. Importation for the members of British goods.

The association translates letters and commercial documents written in English into the French, German, Italian, and Spanish languages at the rate of 8*d.* for a hundred words, including paper; and from these languages into English at the rate of 6*d.*, including paper. Translation.

The association on receipt of a remittance for ten shillings forwards to the sender a card of membership, the insurance policy, an hotel list, and 50 forms of the association.

The card of membership is not transferable, and is good for one year from date of issue.

Membership a guarantee of respectability	The association can cancel a membership without assigning a reason, simply returning subscription. Members remaining in a situation less than two years will not be supplied with a further ticket of membership unless good reasons be adduced for having left that situation, and those asking for change of situation, and not accepting same when offered, will also be cancelled from the list of members.
Non-interference between employers and employed.	The association does not interfere in disputes between employers and members. It limits itself to supplying information concerning vacancies and does nothing that might be considered as interfering between employers and clerks; neither does it interfere in disputes between members themselves.
Special service for temporary engagements.	The association "being advised that many firms would be exceedingly glad to employ additional clerks for a few months at certain times in the year, when pressure of business or illness amongst their usual complement renders such addition necessary, has organised amongst its members a special service." "Through this organisation members can, by filling up the special service form supplied at time of subscribing, be called upon at any moment to enter such a vacancy as aforementioned for any length of time not exceeding six months."
Spezia as a winter resort.	The association appears ably managed and admirably organised to carry out its object, that of "helping such as are willing to help themselves," in truth the most charitable form of benevolence. Attracted by the excellent climate, by the natural beauties of the Gulf of Spezia, and perhaps also by the increasing interest taken by the general public in naval matters, visitors who come to Spezia find excellent hotel accommodation.
Hotel accommoda- tion	The leading hotel, where the drainage has been seen to by an English sanitary engineer, the old-established Croce di Malta, is under British management, and has a chapel, where, during the winter months, services are held by a temporary chaplain sent out by the S.P.G.
Visit of the British fleet.	The visit of the British Mediterranean Squadron, under the command of Admiral Sir Michael Culme-Seymour, in October, 1893, gave rise to a warm and dignified display of sympathy towards Great Britain. The series of festivities organised by the local authorities in honour of the British Squadron received extra lustre by the presence of the King's brother-in-law and cousin, the Duke of Genoa, commanding one of the three Italian Squadrons present to welcome the British fleet at Italy's principal naval port.
Visit of the King and Queen of Italy, and of the German Emperor and Empress. Sea-bathing.	King Humbert and Queen Margherita of Italy and the German Emperor and Empress also visited Spezia during 1893. Prince Henry also embarked here when attending the Italian Naval Manœuvres of 1893. The beach of San Terenzo affords pleasant sea-bathing, and only the absolute insufficiency of house accommodation and villa residences interferes with the development of this neighbourhood as a winter and summer resort.

Agriculture.

The agricultural produce of this district is too unimportant to warrant a separate report on agriculture. None of it is exported; and the supply barely sufficient for the requirements of the local markets.

The olive oil is perhaps an exception, but as the table or cooking oil, supplied for the general public, is sold at a price inferior to that which local pure olive oil always fetches, it is to be presumed that a considerable quantity of adulterated oil finds its way from Tuscany or Southern Italy into the local shops.

In view of the difficulty of obtaining from abroad absolutely pure table oil, British importers desirous of procuring unadulterated olive oil of exquisite flavour would find it worth their while to purchase through a trustworthy agent from the small landowners or metayers. Very low prices could be obtained for cash payment. I have already dealt with this point at sufficient length under the head of exports.

The olive crop of the winter of 1892-93 was abundant in the extreme, and prices declined from 7*d.* to almost 4*d.* the lb. at the mill.

The olive groves of Spezia and Lerici are extensive and form the principal revenue of many landowners and peasant proprietors in this neighbourhood.

Some of the Lerici mills even employ steam power, and oil is also extracted from the crushed kernels for use in the manufacture of soap.

The peculiarly sheltered position of Lerici is also very favourable for the cultivation of oranges and lemons for the local market, but the insufficient rainfall in the summer and the absence of water for irrigation are an almost prohibitory objection to their cultivation on a large scale. Some of the avenues of Spezia are planted with orange trees.

The fertile lower portion of the Magra delta that stretches from Sarzana to Carrara is one of the most productive gardening districts of Italy, producing oil and wine in plenty and exceptionally fine fruits and vegetables.

In addition to the olive and the vine, maize, beans, potatoes, a little wheat in the lower valleys, and the chestnut on the higher slopes, are the principal agricultural produce of the cultivated portion of the valley of the Magra that runs through the mountainous districts of Spezia and Massa-Carrara, from the Apennines to the Mediterranean.

The crests of the sea of hills rising from the coast to the higher ranges are principally covered with pines.

The tendency of the agricultural population to better their condition by seeking fixed employment in Government dockyards and in industrial establishments, is doing great injury to the interests of agriculture as well as bringing down wages in the towns.

Emigration is another evil from which agriculture has suffered.

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Metayer system, want of capital.	The absence of capital and the tendency of the metayers to make the most they can of the land that does not belong to them, and which they may leave at the end of the year, leads to the continual impoverishment of the soil.
Wine crop. Abundant crop, cheap wine. Primitive methods of manufacture.	A very plentiful wine crop during the autumn of 1893 has brought down the price of common table wine, which takes the place of meat with the Italian labourer. The current price is about 6d. the gallon. The cheapness of the article is in part due to the very primitive methods of manufacture. As a rule, good, bad, and even diseased grapes go under the same press, with the sulphur and sulphate of copper still clinging to the fruit.
Superior wine for home consumption. Cinque Terre wines.	Some wines of superior quality are to be found in the district. The larger landowners take some trouble in selecting and cleaning the grapes for wine destined for their own consumption. The sweet and white table wines of the Cinque Terre, name given to the rocky coast between Levanto and Spezia, are first class wines, not easy to obtain however; the prices of the better sweet wine, made from the dried grape, reaches as high as 6s. 6d. the gallon. The vineyards of the Cinque Terre are planted in terraces cut out of the cliffs facing the sea; the grapes exposed to the warm and briny sea vapours thereby acquire a peculiar flavour.
Improvement in vine culture.	The import of American vine-shoots and the sudden waking up of the population to the necessity of combating the "peronospera" and the "phylloxera" by means of repeated sprinkling with sulphur, and sprayings with the sulphate of copper and lime solution, is showing excellent results.
Sulphur and sulphate of copper.	The sulphur is procured at low cost from Sicily. The sulphate of copper employed is of home manufacture, and is of inferior quality. Sulphate of copper from Great Britain has been imported by a leading firm here but has been found to be too costly.
Poultry rearing. Breeds	The profits of the small cultivator are so meagre that considerable store is laid by him on the produce of his poultry. The Italian barndoor fowl, variations of the prolific Leghorn breed, though very hardy and an excellent layer in spring and summer, is fast degenerating in size and is but an insignificant table fowl.
Ignorance in poultry rearing.	Poultry science in Italy is unhappily still in its infancy. A little study of practical poultry breeding would immensely increase the farmer's profits.
Poultry shows and scientific rearing. Efforts to "educate the farmer," rewarded by the King.	Fostered by the Royal Zootechnical Society of Turin, who since 1890 have organised annual poultry shows, scientific rearing is gradually increasing. Three poultry papers are now published in Italy; the first was started ten years ago by Signor Mazzon of Padova, who has also produced an excellent table fowl of immense size, the "Gigante Padovana," the result of forty years selection from a chance cross, and who has only recently received the honour of knighthood for his services to the country in popularizing the breeding of prize poultry on scientific principles.
Importation of pure breeds.	The importation of pure breeds is fast becoming a paying industry. Of the breeds hitherto imported, the Langshan, the best winter layer and table fowl combined, possessing the additional

advantage of beauty in shape and colour, imported from England, is prime favourite.

The local fishing industry is of small importance. The catch is Fishing industry. only sufficient for the supply of the Spezia, Sarzana and Pontremoli Small catch. markets.

The sea-date (lithodomos), having the colour and shape of a The sea-date. large sized date, found only in the rocks near the entrance to the Gulf, is considered a very delicate flavoured shell fish and is much sought after, fetching 7 lire the hundred. The sea-date is peculiar to Spezia and has to be extracted from the rock in which it is embedded. The small sea-date finds its way into a hole in the limestone which it enlarges by constant rotary motion as it grows. The rock has to be broken to release it.

The Palmaria and Porto-Venere oysters, though small in size, Spezia oysters. are plentiful and delicate in flavour. Two firms have been working for several years with no small success in oyster cultivation in the Bay of Spezia; a third firm has already commenced operations; the net receipts have been 6 per cent. of the capital employed.

The oysters mature rapidly and a considerable quantity are sent to Northern Italy.

Anchovies are cured at Lerici for the local markets.

The meat supply of Spezia comprises beef obtained from Bologna Meat supply. and Sardinia, and mutton in small quantities from the province of Lucca. The Sardinian beef is very inferior. A few butchers import cattle of better quality from Bologna.

The arrival of a British squadron at this port, nearly an annual occurrence, is unfailingly preceded by a special order of first class Bologna cattle of excellent quality and about which no complaints have ever been made.

Here again the Spezia-Parma Railway will prove advantageous.

Certificates of origin must now be delivered by the local Cattle disease. veterinary authorities to accompany cattle moved from one parish to another, and stringent regulations have been adopted to stamp out foot-and-mouth disease in Italy.

Agricultural machinery and implements of modern and improved Agricultural implements. type are little known in the district of Spezia and the province of Massa-Carrara.

**Annex A.—RETURN of all Shipping at the Port of Spezia
during the Year 1893.**

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	57	68,611	57	68,611
Italian	762	26,001	182	60,774	944	96,795
Austrian	1	581	1	2,321	2	2,902
Danish	1	172	...	...	1	172
French	2	237	...	...	2	237
German	...	...	2	1,463	2	1,463
Greek	1	684	5	5,063	6	5,737
Scandinavian	...	...	2	1,867	2	1,867
Turkish	...	...	...	...	...	...
Total	767	27,075	249	142,069	1,016	177,864
„ for the year preceding ...	891	42,345	250	128,904	1,141	169,149

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	58	70,052	58	70,052
Italian	747	34,392	189	59,995	936	94,387
Austrian	1	581	1	2,321	2	2,902
Danish	1	172	...	...	1	172
French	2	237	...	...	2	237
German	...	...	2	1,463	2	1,463
Greek	1	684	5	5,063	6	5,737
Scandinavian	...	...	2	1,867	2	1,867
Turkish	...	...	...	...	...	...
Total	752	36,066	257	140,761	1,009	176,817
„ for the year preceding...	790	42,706	265	120,091	1,055	171,797

**Annex A2.—RETURN of all Shipping at the Port of Spezia
during the Year 1892.**

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	38	44,309	38	44,309
Italian	884	41,246	206	77,975	1,090	119,221
Austrian	...	...	...	...	...	...
Danish	...	...	...	...	...	...
French	...	...	...	...	...	...
German	...	...	...	...	...	...
Greek	7	1,099	3	2,421	10	3,520
Scandinavian	...	...	2	1,623	2	1,623
Turkish	...	...	1	476	1	476
Total	891	42,345	250	126,804	1,141	169,149
„ for the year preceding ...	733	33,064	272	121,217	1,005	154,271

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	38	45,336	38	45,336
Italian	782	41,362	210	78,917	992	120,279
Austrian	...	...	...	...	...	...
Danish	...	...	...	...	...	...
French	...	...	...	...	...	...
German	...	...	...	...	...	...
Greek	8	1,344	3	2,421	11	3,765
Scandinavian ...	...	...	3	1,941	3	1,941
Turkish	...	...	1	476	1	476
Total	790	42,706	255	120,091	1,045	171,797
for the year preceding ...	733	41,294	272	120,197	1,005	161,491

Annex B.—RETURN of Principal Articles of Export and Import at Spezia during the Years 1893–92.

EXPORTS.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Lead and copper ores	Tons	6,747	21,040	8,347	25,622
Lead	...	491	5,790	264	3,122
Marble	...	4	13	5	19
Paving stones	...	...	...	47	100
Sundries	...	68	7,100	58	4,300
Total	...	...	33,943	...	38,163

IMPORTS.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Mineral oils	Tons	2,670	13,352	...	...
Coffee	Cwts.	...	...	14	6
Sugar	Tons	12	1,000	9	770
Explosives	...	13	160	12	164
Explosives	...	1	235	...	...
Sulphate of soda	Cwts.	...	...	11	170
Timber	Tons	150	4,839	104	3,744
Lead and silver ores	...	2,117	3,800	2,297	4,370
Old iron	...	9,896	69,625	10,729	75,600
Pig-iron	...	93	243	46	116
Iron and steel, bars and plates ...	...	486	1,390	213	610
Wrought iron and steel	...	307	2,420	156	1,232
Copper, brass, and bronze	...	327	7,010	166	3,567
Zinc	...	18	1,450	10	807
Machinery	...	127	2,730	163	3,509
Cement and plaster	...	67	5,280	122	8,743
Bricks and tiles	...	700	1,126	719	1,150
Coal	...	796	1,858	649	1,700
Wheat	...	112,538	104,500	87,799	81,520
All other articles	...	21,402	175,800	16,214	133,200
Total	...	2,960	26,745	3,723	31,450
Total	...	...	423,563	...	352,418

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AND FINANCE.

ITALY.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF THE CONSULAR DISTRICT OF LEGHORN.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1250.

*Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.*

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ITALY.

LEGHORN.

Consul W. Percy Chapman to the Earl of Kimberley

My Lord,

Leghorn, April 23, 1894.

I HAVE the honour to transmit herewith my Report on the Trade and Commerce of this District for the year 1893, together with a Report on the Trade of Elba, by Mr. Vice-Consul Tonietti.

My report on the cholera is in great measure based on the exhaustive official "Relazione sulla Epidemia CholERICA del 1893" of Dr. Lutrario, the Provincial Medical Officer. This admirable work deserves more than a merely local circulation, and is, I am convinced, well worthy the attention of medical and scientific bodies in England.

I have, &c.

(Signed) W. PERCY CHAPMAN.

*Report on the Trade and Commerce of the Consular District of
Leghorn for the Year 1893.*

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NORE.—Following the previous practice of this Consulate, the lira has, in all the tables of the report, been converted at 25 lire to the $l.$. That some deduction must be made from this year's figures may be gathered from the actual exchanges quoted on page 6. The metrical system of weights and measures prevails in Italy; but the English equivalents have, in all cases, been given in this report.

Introductory—General Trade.

Trade and
cholera.

The opening months of 1893 showed every prospect that the trade of Leghorn, slowly recovering from the great crash of 1891, would attain at least the average volume of the last 6 years. But all chances of such a result were frustrated by the advent of the cholera in September (see separate article), and it is evidence of the commercial vitality of Leghorn, that in the face of such a disaster the drop in her general trade should not have been greater than it was.

The following table shows the value of the total of imports and exports for the last 4 years :—

TABLE showing Total Value of Imports and Exports during the Years 1890–93.

		Value.			
		1890.	1891.	1892.	1893.
		£	£	£	£
Imports.. ..		3,091,217	2,317,497	2,264,110	2,177,120
Exports.. ..		1,681,950	1,643,753	1,546,711	1,688,160
Total		4,773,167	3,861,250	3,810,821	3,765,280

Decline of
trade.

The figures for the last 3 years are a sufficiently depressing fact. The average value of imports and exports for the 7 years ending 1880 was 5,617,595*l.* (6,185,208*l.* in 1874); for the 7 years ending 1887, 4,894,142*l.* (5,194,519*l.* in 1885); and for the 6 years ending 1893, 4,038,687*l.* (4,773,167*l.* in 1890). The average annual value of imports and exports for the years embracing the period from 1874 to 1890, up to the year, that is, preceding the great failures of 1891, was 5,080,997*l.*, so that it may be said that Leghorn has a traditional claim to an annual turnover of 5,000,000*l.*, whereas the year 1893 only shows 3,765,280*l.*, or about three-quarters of the requisite amount.

There is one obvious cause for the decline of the past 3 years. In 1891 several large houses of world-wide celebrity and importance went down in the commercial crash of that year.

The influence of their names was sufficient to attract a large volume of import which, but for this, might have found other equally satisfactory channels of entry into Italy. It would appear that, as yet, no other firms have risen up to take the place of these great houses, and their loss is plainly written in the statistics for 1891, 1892, and 1893. Take, for instance, one article of import largely dealt in by one of these firms—grain. The quantity imported in 1889, 59,620 tons, dropped in 1891 to 22,467 tons, and does not rise beyond 28,861 tons in 1893. Take another article—sugar. The quantity imported in 1890 was 52,950 cwts., in 1892 only 12,148 cwts., and in 1893 it has dropped to 11,850 cwts.

Until, by some means, the business which these great houses attracted to the city can be brought back, or until one of those unlooked-for revolutions in trade find a fresh use for the port of Tuscany, it is to be feared that the statistics of Leghorn must continue to show, more or less, the present decline from the good round figure of her historical average.

In the figures for 1893 there is one sign of health which should Exports. be a source of encouragement and gratification to the Livornesi themselves, namely, that the value of exports is somewhat in excess of the figures of the 2 previous years, and that, too, in spite of the cholera scourge. Indeed it is not so much in its export trade that Leghorn is showing decaying symptoms. The average value of exports for the 7 years ending 1880 was certainly 2,418,413*l.*; the average value for the 7 years ending 1887, 2,026,760*l.*, whereas the average value for the 6 years ending 1893 was 1,461,094*l.*, an amount exceeded by this year's figure of 1,588,160*l.* The average value of exports for the 20 years ending 1893 is 1,926,279*l.*, so that it will be seen that this year's figure of exports is not so very gravely below the traditional average.

The Cholera Epidemic of 1893.

The brief Reuter's telegram announcing the outbreak of cholera at Leghorn, and the subsequent summary daily bulletin of the number of cases and of deaths, conveyed no idea whatever of the panic and consternation which seized the city, and the almost total paralysis of commerce that supervened. General consternation and paralysis of commerce.

The outbreak commenced on September 10, when there were 16 cases and 5 deaths. Although the height of the bathing season is over on August 31, numerous visitors come to Leghorn for the cooler month of September, when the bathing is extremely enjoyable. Needless to say that the advent of the cholera prevented many visitors arriving, and drove away those who were already present. Altogether, between visitors and residents, it has been estimated that some 30,000 to 40,000 people fled the infected city, while the busy port immediately became almost denuded of ships. It is fortunate that the outbreak did not occur before the bathing season proper, on which the hotels, *pensions*, shops, boatmen, cabmen, tramway and omnibus companies, &c., rely for their more Effects on trade.

substantial profits. As it was, the damage done to trade was considerable enough, and is reflected in tables A, B, C, and D, which show an unfortunate decrease in imports and exports, and shipping. All this, with the unsatisfactory financial condition of the country in general, the unfavourable rate of exchange, the high premium on gold and silver, and the scarcity of small coin, cast a gloom over the city quite foreign to the Italian character even in ordinary times of want.

Energy of the authorities.

The authorities lost no time in dealing with the outbreak, and throughout the epidemic showed a commendable energy and activity in the vigorous measures they took to isolate existing cases and prevent the spread of the disease.

How communicated.

Of the first 22 cases, 21 were females, all of whom had been washing in the public washhouses, and this was quite sufficient to prove an etiological nexus between the outbreak of the disease and these washhouses. At that time the Fraissinet boats were bringing from Marseilles hundreds of Italian workmen returning to their country after the unfortunate events of Aigues-Mortes. Although a strict sanitary watch was kept upon all arrivals, and although, theoretically, all the passengers' dirty linen was disinfected by immersion in corrosive sublimate, the medical officers of health state that it was extremely difficult to be sure of having carried out this sanitary regulation in all cases. A strong prejudice against the process of disinfection existed in the popular mind, and many were the shifts to which the people resorted in order to avoid it. Some men were found wearing several changes of dirty linen; others preferred throwing their things into the sea, whence they were picked up by boatmen and sold in the city; others again succeeded in selling them to boatmen over the ship's side for trifling sums. In any case it is certain that the unwashed and undisinfected linen of some of the passengers from Marseilles found its way into the Leghorn public washhouses, and was the cause of this year's epidemic of cholera.

Confined to two districts of the city.

The disease was confined to two distinct quarters of the city both inhabited by the poorest classes, namely, the district of Venezia (so called from the canals which intersect it) and the Piazza dell' Erbe, until last month (March, 1894) the centre of the Leghorn market. The epidemic, which lasted till October 30, was throughout a light one as compared with previous outbreaks. From October 7 to October 12 only two cases a day occurred, and it was generally beginning to be believed that the epidemic was coming to an end, when on October 14 the city was startled by the announcement that there had been 46 cases and 38 deaths almost all in the district of Venezia. This fresh outburst was very clearly traced to the drinking water. Near the public washhouses Dr. Lutrario, the provincial officer of health, found a small fissure in the branch conduit which supplies Venezia with drinking water, and there were manifest traces that the dirty water of the washhouses had leaked into the duct. On an analysis of its contents being made, the presence of the comma bacillus was discovered. The conduit was immediately cut off from com-

A fresh outburst in Venezia.

Contamination of the water supply.

munication with the water system of the city, and water was brought into the town by train from Massa, and by tank-vessel from Naples.

It is a matter of some wonder, and it is certainly a matter of congratulation, that the bacillus was not communicated to the whole water supply of the town. This is to some extent due to the fact that the pressure of the main conduit would prevent the water of the Venezia duct from returning into the general circulation, and also to the fact that communication with the latter duct has for a long time been cut off every evening by special municipal regulation. Immediately the Venezia water ceased to be drunk this fresh outburst began to decline. On October 19 there were only 5 cases; on October 20, 3 cases; on October 21, 5 cases; on October 22, 1 case; on October 23 and 24, none; on October 25, 2 cases; from October 26 to 29, no cases; and one solitary case on October 30 brought the epidemic to a close. Decline of the epidemic.

The total number of cases from September 10 to October 30 was 370, of which 252 were females and 118 males; the total number of deaths 173, of which 119 were females and 54 males. Total number of cases and deaths.

Of the total number of cases, 214 were treated in the homes of the patients, and 98 of these cases resulted in death. 156 cases were treated at the specially-prepared cholera lazaretto outside the city where there were 75 deaths. Cases treated.

90 per cent. of the deaths of females occurred among women without occupation who attended to their domestic duties at home. All the cases throughout the epidemic occurred among the poorest classes. There was not a single case in barracks, prisons, or charitable asylums, even when situated in the two infected districts. Nor was there a single case among the attendants and nurses, or the men set aside for disinfecting duties. Dr. Lutrario records it as a fact worthy of note that among rag-pickers (a numerous class in Leghorn) there were only three cases. 90 per cent. of deaths among women.

The expenses incurred by the commune in grappling with the epidemic amounted to 135,370 Italian lire (5,414*l.*), or about 365 lire (15*l.*) for each case. About 40,000 lire (1,600*l.*) of this amount was spent on disinfectants and the service of disinfection, and 10,000 lire (400*l.*) in bringing fresh drinking water into the town. Expense incurred by municipality.

There have been altogether five epidemics of cholera at Leghorn. In all, except the present, the disease spread to every part of the city, and even to the neighbouring villages. The following table shows the statistics of these outbreaks:— Five epidemics of cholera at Leghorn.

STATISTICAL Table of these Epidemics.

Year.	Cases.			Percentage of Deaths.
	Males.	Females.	Total.	
1835	1,156	862	2,018	56
1854	499	533	1,032	57
1855	868	915	1,783	55
1867	533	742	1,275	61
1893	118	252	370	46.7

*Banking and Exchange.***New banks.**

A new bank, the "Banca Tirrena" (Tyrrhenian Bank), was opened in Leghorn in March, 1893. It is designed to take the place of the Bank of Leghorn which was submerged in the failures of 1891, and its success would be of material assistance to the commercial requirements of the town.

**The failure of
Messrs.
Macquay
Hooker and
Co.**

The old established English and American banking firm of Macquay Hooker and Co., of Florence, Rome, and Leghorn were compelled to suspend in December, 1893, owing to the large run on their Florence house, occasioned by other banking failures in that city. Their suspension caused very general regret, but the bank in all its branches is now undergoing re-organisation.

**Bank of
Naples.**

Since the failure of the Bank of Leghorn there has been a persistent rumour that the Bank of Naples would start a branch in this city, but this has not yet been done.

**High rates of
exchange.**

Exchange on London has been very high during the past year, especially during the past 6 months, at one time standing as high as 29.27. The following table shows the mean exchange between the buying and selling price for cheques on London at end of each month of 1893:—

MEAN Exchange at the end of each Month of 1893.

Month.					Mean Exchange.	
					Lire	c.
January	..	..	..	..	26	16
February	..	..	..	..	26	18
March	..	..	..	..	26	16
April	..	..	..	..	26	19
May..	..	..	..	..	26	38
June	..	..	..	..	26	36
July..	..	..	..	..	27	24
August	..	..	..	..	27	96
September	..	..	..	..	28	16
October	..	..	..	..	28	74
November	..	..	..	..	29	95
December	..	..	..	..	28	14

The premium on gold has been as high as 15 per cent. and on silver 13 per cent., while merchants and shopkeepers have had to pay 2 cent. for the accommodation of a few hundred francs worth of copper. Premium on gold, silver, and copper.

There seems little prospect of any immediate lasting improvement in the financial situation. A case came under my notice lately in which a well-known Leghorn banker had contracted to give an English merchant in a large way of business, 28·70 for his cheques on London for the whole of 1894. This is good evidence that Italian opinion does not seriously incline to believe in any substantial change for the better in the near future. Prospects of improvement.

Boracic Acid.

Only 1,262 tons of boracic acid were exported from Leghorn in 1893, as opposed to 1,487 tons in 1892, 2,023 tons in 1890, and 3,004 tons in 1886. Export.

The following table shows the quantities of boracic acid, and borax and borate of soda exported from Leghorn from 1886–92.

TABLE showing Quantities of Boracic Acid, and Borax and Borate of Soda Exported from 1886 to 1892.

Year.	Quantity.	
	Boracic Acid.	Borax and Borate of Soda.
	Tons.	Tons.
1886	3,004	310
1887	2,832	478
1888	1,181	503
1889	1,912	881
1890	2,023	744
1891	1,914	617
1892	1,489	716

Whereas it will be seen that the export of boracic acid has considerably declined since 1886, the export of borax and borate of soda has as steadily increased. Indeed, it is principally owing to the producers of the acid having found it profitable to convert it into borax for shipment abroad (several firms in Turin and Florence are also engaged in similar business) that the decline in the export of native acid is to be attributed. Export of boracic acid declined, and of borax increased. Cause.

But even admitting this fact, there can be no doubt that the competition of the borates from California, Peru, Chile, Bolivia, Argentina, Persia, Asia Minor, and Thibet, are seriously affecting the value and the demand for the once indispensable Tuscan boracic acid. It is not that boracic acid is found, or at any rate developed to any great extent in California, but the native borax Other borates are serious rivals.

and borates of lime, from which borax and boracic acid can be produced, exist in an abundance which quite over-shadows the Tuscan supply. Indeed, a well-known London merchant lately informed me that there existed enough borate of lime in one locality of California to supply the world for years.

A good business can still be maintained.

Still, if the producers in Italy of the native acid continue to undersell their American and Eastern competitors they have reason to hope for the maintenance of a business, if not of as flourishing proportions as in the past, at least of a solid and remunerative character.

Coal.

Import. The import of coal into Leghorn varies very little. 217,169 tons were imported in 1893 as against 219,132 tons in 1892, from which it would appear that the strikes at home did not much affect the trade here.

Freights. Freights from the United Kingdom ruled at as low a figure as 5s. and 6s.

German coal. It is worthy of remark that a trade is springing up in German coal and coke which comes into competition with exports of these articles from Great Britain. Importers are sanguine of establishing a good sale in Tuscany, and two firms of good standing have already entered into contracts for the coal.

Worked Coral.

Export. The coral industry of Leghorn for 1893 calls for little special remark; 48,794 lbs. avoirdupois of worked coral were exported, as against 41,608 lbs. in 1892. As fully three-quarters of the coral worked at Leghorn is sold in British-Indian markets, it may be imagined that the continued depreciation in the value of the rupee is a source of considerable loss to merchants here, while they consider that the recent imposition of an import duty on coral by the Indian Government will seriously affect their large trade with our Eastern Empire. It may, however, be safely doubted that the demand for coral in India, based as it is upon long-standing traditions and superstitions, will be appreciably affected by the question of its cost.

The Sciacca beds

It is said that the famous coral beds of Sciacca (Sicily) are rapidly becoming exhausted, and that the price of Sciacca coral is likely to be high this year, not only because of its scarcity, but on account of the additional expenses entailed by the more difficult fishing operations which are required owing to the scarcity of the coral.

Fish Trade

Newfoundland and Labrador cod.

The season for the import of Newfoundland and Labrador cod lasts from about September to March. The season just ended

shows much the same result as the last. 52,000 quintals of Labrador-cured cod have been imported as against 51,800 quintals last year, and 13,500 quintals of shore codfish cured in Newfoundland as against 16,000 quintals last year. The first arrival of shore fish by steamer fetched 18s. per quintal cost, freight, and insurance, but prices gradually fell to 13s. 6d. per quintal. First arrivals of Newfoundland fetched 1l. per quintal, and there was no great decline from this figure. Fish merchants in England have keenly felt the high exchanges, which have considerably reduced the sterling remitting prices. The consumption of cod this year (1894) seemed to slacken just when it might have been expected to increase, namely, during Lent, and about 5,000 quintals of Labrador cure still remain undisposed of.

7,200 quintals of Norwegian cod ("klipfish") and 6,480 quintals of "stok-fish" were landed at Leghorn during 1893. The price for the former averaged 1l. 1s. per quintal. Klipfish and
stokfish.

The import of herrings has been large. 38,000 barrels were landed as compared with 36,944 barrels in 1892. There has also been a large import of the Spanish pickled and pressed herring ("sardina prensada"). Yarmouth
herrings.
Spanish
herrings.

The import of pilchards is also in advance of last year, 6,150 casks having been landed as against 4,080 casks in 1892. Too great a quantity of the fish seems to have been enclosed in Cornwall during the summer and autumn, and the Italian markets have been glutted, to the detriment, of course, of the curers. Pilchards.

As regards the retail trade, salt-fish of all kinds ceased to be eaten when the cholera appeared, and subsequent epidemics of influenza have also had a bad effect on its sale. The retail
trade.

Olive Oil.

The crop of 1893-94 has proved the most abundant for many years past. Unfortunately, results are not so favourable in respect to quality, owing to the fruit in some localities having been considerably damaged by frost; the oil obtained therefrom, being of second or third-rate description, will sell only at low prices and with difficulty. Oil of the choicest quality is not in over-abundant supply, and meets with a good demand. Taking into account the present rates of exchange, prices rule from 15 per cent. to 25 per cent. below last year's, according to quality. Abundant
crop.

Shipbuilding.

Among the industrial establishments of Leghorn, Messrs. Orlando Brothers' ship-building yard is always conspicuous for its busy activity. Orlando
Brothers'
yard.

The following war-vessels are now in course of construction or completion in the yard or wet docks:— War vessels
in course of
construction.

1. The Italian cruiser "Umbria"; displacement, 2,250 tons; The
"Umbria."

	length, 263 feet; breadth, 39½ feet; draught, 15 feet; i.h.p., 6,500. This vessel is already commissioned for purposes of her preliminary trial-trips, and her final delivery to the Ministry of Marine is announced for the month of May.
The "Caprera."	2. The Italian torpedo cruiser "Caprera" (called after Garibaldi's island home); displacement, 840 tons; length, 229½ feet; breadth, 26½ feet; draught, 10½ feet; i.h.p., 4,000. She will be ready for delivery in October, 1894, or, at latest, at the end of the year.
The "Varese."	3. The Italian cruiser "Varese." This vessel has only been laid down this year, and I withhold particulars concerning her until she is in a more advanced state of completion.
Gun-vessel for the Sultan of Morocco.	4. A gun-vessel of 1,100 tons for the Sultan of Morocco is also in course of construction, and will be delivered at the end of 1894.
Repairs to the "Vesuvio."	The cruiser "Vesuvio," built by Messrs. Orlando in 1886, has been in their hands for some time for the purpose of having her machinery overhauled. She is now in readiness for sea.
Delivery of the "Etruria."	The cruiser "Etruria," a sister ship of the "Umbria" described above, was delivered on September 9, 1893. Messrs. Orlando have every reason to be satisfied with the wonderful success of her trial trips. The indicated horse-power contracted for was 6,500, and the "Etruria" developed i.h.p. 7,600, or 1,100 above the contract power, and for this extra development the constructors received a premium from the Italian Government.

Public Works.

Proposed extra harbour accommoda- tion.	The improvements to the "Mandraccio," and the proposed creation of another commercial basin in prolongation of this part of the port, have so far progressed as to take the shape of a formal convention between the municipal authority and the Government. The Government is to advance the town 2,500,000 lire, repayable in various instalments terminating in 1902. The municipality is to enjoy the concession of the new works for 50 years, when they become the property of the Government.
Details of scheme.	The scheme consists of deepening the centre of the "Mandraccio" harbour to 26½ feet so as to form a canal leading up to the proposed new basin which will penetrate to the heart of the Maritime Railway. The basin will be 1,312 feet long, 246 feet wide, and 26½ feet in depth. 16 cranes will be erected for use in the new harbour, and shed accommodation for the storage of merchandise will be provided extending to 131 feet in length and 49 feet in depth. An elaborate tariff of charges for the use of the new basin and of the cranes and sheds has been drawn up, from which the municipality hope for a substantial addition to their revenues now only too much in need of augmentation.
Not yet commenced.	The convention was signed in August, 1893, but at the time of writing (April, 1894), nothing whatever had been done to commence the new works, and the public and the press seem altogether to

have forgotten their eagerness to see their much-talked-of scheme set on foot.

The breakwater designed to protect the outer harbour from the dangers of the south-west gales and from undue silting was completed early in the year (1894). According to the first arrangement it was not to be finished till September, 1894, but owing to the distress in this city caused by the cholera, extra hands were taken on, and the work pushed forward briskly. Full particulars of the breakwater were given in my report of last year.

The scheme for the new water supply on which I also reported has not practically advanced, except that official prejudice against it seems to some extent to have abated. The contamination of the present supply by the cholera bacillus, and the import into the town of extra water by train and tank-ship, has drawn public attention more emphatically to the defects of the existing supply, and to the great need of its speedy augmentation. It is to be hoped that the present year may not close without the actual commencement of some good scheme.

The imposing "New Market" was opened on March 1, 1894. It is a spacious building, 312 feet in length, 85 feet broad, and 115 feet in height, the property, of course, of the municipality who let out the stalls to the various dealers. An Italian market is of a more comprehensive character than an English one, and includes the sale of vegetables, fruit, meat, fish, game, bread, maccheroni, and even, to some extent, of confectionery and haberdashery. The old market, though recognised and sanctioned by the municipality, was little better than an aggregation of unsavoury slums, and no people thought of going there except those who were bound to lay in the daily provisions. It may therefore be hoped that the clean new building will give a certain impulse to retail trade, but vendors are loud in their complaints against the high figure of rent which they have to pay to the municipality for the privilege of a stand in the market, and it is to be feared that this may cause a rise in the price of commodities which are already unduly dear. Indeed, the price of such necessities as gas, petroleum, salt, sugar, and other groceries would be a matter of surprise to an English householder.

Shipping.

4,496 vessels entered the port of Leghorn during the year 1893, and 4,453 vessels cleared outwards, as opposed to 5,308 entries in 1892, and 5,293 clearances. The decline in shipping is solely to be attributed to the cholera, many general traders having preferred to lose a small instalment to their cargoes at Leghorn, to the grave inconvenience of undergoing quarantine regulations in other ports.

Of the entries during 1893, 339 were British vessels (16 sailing), of which 135 were regular traders between the United Kingdom and the Mediterranean with cargoes of general merchandise; 29 with similar cargoes trading between Italy and the United States; 24 running between Antwerp and the Mediterranean; 91 with

cargoes of coal and patent fuel; and 14 (all sailing with the exception of two small steamers) with cod from Newfoundland and Labrador.

British clearances.

341 British ships cleared outwards of which 102 cleared in ballast for Black Sea and Mediterranean ports, the remainder being nearly all regular traders. It is seldom that vessels (with the exception of Messrs. S. Rae and Co.'s direct line, twice monthly) load a complete cargo at Leghorn. Occasionally small sailing ships are able to secure a complete cargo of marble for the United Kingdom, or to load a general cargo for Bristol or Dublin.

Cholera the cause of the slight decline of British shipping.

British entries for 1893 have declined by the small number of nine as compared with 1892. Had it not been for the cholera, there is every reason to suppose that the number of British ships visiting the port would have been greater than last year. For instance, Messrs. Knott's "Prince" line, of which 26 vessels had called up to August 20, ceased to call at the port on the first outbreak of cholera, and only one vessel of the line touched at the port during the remainder of the year.

Advisability of vessels not depositing their articles communicating with the Consulate.

Of the 339 British arrivals at least 73 stayed under 48 hours, and were consequently not obliged to deposit their articles at the Consulate. In my previous report I pointed out the difficulty of ascertaining the particulars concerning these vessels required for the Foreign Office Annual Return of British Shipping. Since the Consulate receives no official notice of the arrival of such vessels, and is entirely dependent on the local paper or other chance sources of information for its statistics regarding them, it is impossible to guarantee a correct return of shipping, and I am more than ever convinced of the necessity of carrying out the suggestion I made in my last report (No. 1,250), viz., that masters of such vessels should be required to fill in a form sanctioned by the Board of Trade, giving such particulars as are required for the consular registers.

The Naval Academy.

The annual cruise of instruction of the naval cadets.

The annual cruise of the cadets of the Royal Naval Academy (which is situated at Leghorn) commenced on June 22. A new departure was instituted this year by sending the Training Squadron to the United States, for it has never been further out before than the Azores. After staying a few days at Gibraltar, the squadron, consisting of the "Vittorio Emanuele" (frigate), the "Flavio Gioia" (cruiser), and the "Amerigo Vespucci" (cruiser), started across the Atlantic and eventually called at Annapolis, Baltimore, and New York. From the latter port some of the cadets were sent on a visit to the Chicago Exhibition.

On the return voyage Tangiers, Gibraltar, Cagliari, and the Golfo degli Aranci were touched at, and the cadets were disembarked at Spezia on October 21, the cholera epidemic making it impossible for them to be landed at Leghorn.

A death from scarlet fever occurred at the Academy during 1893, and the establishment was closed and the cadets sent to

their homes. This incident tended to confirm the rumour that the Academy was unsound from a sanitary point of view, and the Ministry of Marine commissioned Mr. George Jennings, of Lambeth, to thoroughly overhaul all the sanitary arrangements of the building. This work has now been completed, and has, I understand, given great satisfaction.

A Royal Decree, dated January 28, 1894, institutes important changes and reforms in the system of instruction and the personnel of the Academy. The scheme is the work of Vice-Admiral Morin, who was in command of the Academy until his recent assumption of the office of Minister of Marine. The following summary of the principal changes and new regulations may not be without interest.

The Academy is defined as existing for four purposes :

Scope.

1. For imparting the instruction required for qualifying for appointment as midshipmen, engineer-students or paymaster-students, these three ranks being assimilated in the Italian navy (relative rank in the army sub-lieutenant).

2. For the instruction required in passing from engineer-student to the rank of engineer of the second class.

3. For completing instruction in the hydrographical, submarine, or gunnery branches.

4. For the instruction of a few selected engineer petty officers.

The staff of the Academy is to consist of the following *Staff.*

officers:—An admiral in command; a captain, second in command; a senior lieutenant (*capitano di corvetta*), in charge of the routine of the Academy; a lieutenant as flag-lieutenant and secretary to the admiral in command; four lieutenants for inspection duty; a sub-lieutenant, adjutant; four sub-lieutenants, watch-keeping officers; four senior lieutenants (*capitani di corvetta*) or lieutenants as instructors; three chief engineers of the second class, or engineers of the first class, as instructors; a chief paymaster of second class or a paymaster of first class; a chief surgeon of first class or second class; a surgeon of first class; a chief paymaster of the second class as reporter to the administrative council; a paymaster of the first or second class as general paymaster and in charge of the commissariat; twenty-eight professors and masters (civilians), and the necessary number of petty officers, instructors and seamen required for the various services of the Academy.

The age at entry is not to exceed 19 years on October 1 of the year of examination. *Age of entry.*

The normal course of instruction at the Academy embraces, for qualifying for midshipmen, navigation; for engineering students, naval engineering; and for paymaster students, the accountants' branch of studies. Cadets qualifying for midshipmen study for 3 years; for engineer students for 32 months; and for paymaster students for 20 months. *Normal course of instruction.*

From November 15 to June 15 the instruction is conducted on land, and from July 1 to November 1 on board men-of-war. *Instruction on land and on men-of-war.*

Midshipmen, two months after their appointment as such, have

Instruction of midshipmen after appointment.	to complete their course of instruction for 10 months on board a man-of-war specially detailed for this service. At the end of the following October they will disembark from such vessels and go through their examination for sub-lieutenants.
Examination for sub-lieutenants.	The subjects of this examination are: Navigation and nautical astronomy, naval manœuvres, engines, guns, torpedoes, naval strategy and tactics, and nautical meteorology.
Instruction of engineer students.	Engineer students on leaving the Academy are to be sent to work in an arsenal until the beginning of the next scholastic year, when they will return to the Academy for the complementary course, which lasts from November to June. Their course of study embraces the following subjects: thermo-dynamics, electricity, plans of ships and engines. They are then subjected to their examination as engineers of the second class.
Three special courses.	There are three courses of special subjects at the Academy, to which only lieutenants of not more than 3 years' service and sub-lieutenants are admitted. The Ministry of Marine decides every year the number of students who shall be admitted to these courses in accordance with the demands for admission, but the Ministry has power to order officers to undergo instruction when voluntary candidates are not sufficient.
Subjects of these courses.	The following subjects are dealt with in these special courses:— 1. <i>Hydrographical Course.</i> —Hydrography; geodesy; topography. 2. <i>Gunnery Course.</i> —Gunnery; chemistry; thermo-dynamics; ballistics; material relating to guns. 3. <i>Torpedo Course.</i> —Chemistry; electricity; material relating to torpedoes and to electrical appliances.
Superior course for engineer petty officers. Regulations previously in force.	Engineer petty officers of whatever grade who are under 32 on October 1, and who have been at sea 3 years, will be admitted to a superior course of studies. This course will last 2 years. The regulations previously in force were:— A course of instruction at the Academy for 5 years, the first 2 years of which have now been suppressed. Midshipmen had to have 2 years' service, of which $1\frac{1}{2}$ at sea before passing their examination for sub-lieutenants. After 2 years' service as sub-lieutenants they went through the superior course at the Academy, which lasted about 6 months, and after passing an examination they were eligible for promotion to the rank of lieutenant. The time of service as midshipman and sub-lieutenant is now from 5 to 6 years, and is likely in the future to increase. In consequence of the new regulations there will be no examination for entry to the Academy before October, 1896.

Annex A.—RETURN of Principal Articles of Import into Leghorn
during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Coal and coke	Tons ...	219,132	281,343	217,169	219,469
Coffee	Cwts. ...	11,812	56,566	12,037	58,743
Cotton—					
Raw	" ...	15,792	30,508	23,514	49,959
Yarns and thread	" ...	1,084	5,530	1,164	7,098
Tissues	" ...	5,323	43,296	4,350	35,366
Fish, cured	Quintals ...	164,261	215,250	176,860	215,639
Hides and skins, raw	Tons ...	1,009	42,106	2,225	180,918
Iron, pig and scrap	" ...	10,007	29,991	19,558	61,780
Jute, raw	" ...	1,655	26,937	1,438	21,642
Mineral oil	" ...	6,794	16,973	6,728	45,788
Sugar	Cwts. ...	12,148	8,892	11,850	8,674
Tobacco, leaf	Tons ...	6,349	289,178	6,297	273,506
Wheat	" ...	32,338	144,667	28,861	269,773
Wool—					
Washed and unwashed	Cwts. ...	5,129	33,901	6,040	30,696
Yarns and tissues	" ...	1,196	23,501	1,720	36,277

Annex B.—RETURN of Principal Articles of Export from Leghorn
during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Boracic acid	Tons ...	1,439	36,350	1,262	27,195
Candied fruits	Cwts. ...	25,890	92,107	33,502	119,222
Coral, worked	Lbs. ...	41,608	135,979	48,794	159,565
Eggs	Cwts. ...	4,078	10,780	4,169	11,018
Hemp, raw	Tons ...	4,625	142,924	4,723	140,215
Hides and skins, raw	" ...	2,312	188,421	3,223	261,992
Marble and alabaster—					
Rough and in blocks	" ...	12,243	36,439	12,513	33,056
Worked	" ...	5,741	25,684	9,406	76,450
Mercury	Cwts. ...	5,116	45,710	4,620	41,798
Olive oil	" ...	78,326	167,238	61,320	133,313
Rags, vegetable	Tons ...	690	7,101	1,302	16,930
Soap	" ...	1,295	26,326	837	17,011
Straw hats	Number ...	856,134	37,669	220,160	9,687
Wine—					
Barrels	" ...	197,208	8,274	129,272	7,521
Bottles	Number ...	174,768	10,136	451,472	29,797

Annex C.—RETURN of all Shipping at the Port of Leghorn during
the year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	16	2,610	323	346,324	339	348,934
Italian	2,747	136,714	1,094	721,138	3,841	857,852
Belgian	..	...	5	4,835	5	4,835
Dutch	...	...	42	33,116	42	33,116
French	8	757	146	61,088	154	61,845
German	...	...	35	35,985	35	35,985
Greek	5	1,625	15	16,380	20	18,505
Swedish and Norwegian	2	272	14	10,320	16	10,592
Other countries	8	3,643	36	29,891	44	33,534
Total	2,786	145,621	1,710	1,259,577	4,496	1,405,198
„ for the year preceding	3,378	178,456	1,930	1,418,408	5,308	1,596,864

(1752)

B

CLEANED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	17	3,708	324	343,712	341	347,418
Italian	2,717	133,461	1,063	716,938	3,780	850,399
Belgian	...	...	5	4,835	5	4,835
Dutch	...	...	42	33,116	42	33,116
French	8	767	146	61,588	154	62,355
German	...	...	35	35,385	35	35,385
Greek	6	1,619	15	16,880	21	18,499
Swedish and Norwegian	3	396	14	10,320	17	10,715
Other countries	5	2,220	33	30,803	38	33,023
Total	2,756	142,358	1,697	1,253,677	4,453	1,396,035
„ for the year preceding	3,367	172,067	1,926	1,414,339	5,293	1,586,396

NOTE.—Referring to my note on the return of shipping for the year 1892, I have this year adopted a new system—namely, that of procuring the figures for the Italian and for the total foreign shipping from the Captain of the Port, and those for the various countries specified from the consuls representing them, with a result which is certainly more satisfactory than that previously arrived at.

PIOMBINO.

The tin-plate works of Messrs. Spranger, Ramsey, and Co.

In my last year's report (No. 1250) I gave some account of the rolling mills of the Italian "Società la Perseveranza" working at Piombino. I am now in a position to furnish a few particulars concerning the tin-plate works of Messrs. Spranger, Ramsey, and Co., an English firm, established in this town.

The industry largely dependent on the customs tariff.

Tin-plate bars are imported from Great Britain, rolled into black sheets, and tinned on the spot. This industry, too, is largely dependent on the customs tariff for support, though no doubt cheap labour also contributes, while the present abnormally low freights for coal from Great Britain, ranging from 5s. to 6s. per ton, enable works in Italy situated on the sea-coast to obtain supplies of coal at very low prices.

MONTE AMIATA.

Quicksilver Mining in Tuscany.

The importance of the mines of Monte Amiata. Situation.

The quicksilver mines of the district of Monte Amiata undoubtedly rank amongst the most valuable and important mineral resources of Tuscany. Monte Amiata, the Mons ad Meata of the ancients, is situated in the province of Grosseto, between the valleys of the Rivers Orcia, Fiora, and Paglia. It is distant from Siena 36 miles, and about the same from the headland of Monte Argentario. From the latter locality it forms the most noticeable feature in the distant horizon, with its summit, snow-capped for most part of the year, rising from amidst the

surrounding mountains to an altitude of 5,687 feet above the level of the sea. Its base occupies an area of about 120 square miles. Situated almost in the centre of the Maremma, where malaria is prevalent in the summer, Monte Amiata from its elevation enjoys a salubrious climate. Chestnut trees are extensively cultivated, the fruit forming a staple article of food to the labouring classes of the district.

The quicksilver mines are situated to the south-east of the Monte Amiata, near the village of Castell' Azzara, at a distance of about 12 miles from the Lake of Bolsena.

Writers on the subject have pointed out that the presence of cinnabar, the ore of quicksilver, was clearly known to the ancient Etruscans, as the frescoes in the rock tombs of the ancient cities of Saturnia and Sovana, and the vases found therein prove, the red pigments used being derived from cinnabar. Moreover, Mr. T. Haupt, a mining engineer of great experience in connection with the Monte Amiata mines, adduces the discovery made in the well-known mine of the Siele of stone implements as proof that the ore was worked during the Age of Flint. In 1878, when a French company were carrying on prospecting operations in the vicinity of Castell' Azzara, some human skeletons were found in the course of driving an adit, and close by them a gold coin bearing the inscription "Philip of Macedon." These facts would point to the conclusion that the cinnabar deposits of the Monte Amiata were known and to some extent worked at a period of extreme antiquity.

The revival of mining operations in this district dates from the year 1846, when the accidental discovery of some pieces of rich cinnabar in the bed of a torrent induced a speculator to acquire the mining rights over the surrounding lands, and subsequently to form a small company for the purpose of searching for quicksilver. No satisfactory results were obtained, and with the exhaustion of the small capital, about 1,200*l.*, operations ceased. After various vicissitudes this same mining property was bought at auction in the year 1865 by a Jewish merchant of Leghorn, Signor Rosselli (in whose family it continues to the present day), for about 3,000*l.*; but no one then could have foreseen the brilliant future reserved for this mine of the Siele.

In fact in the year 1866 it produced only 58 cwts. of quicksilver, of the value of about 600*l.* But gradually the yield increased until, in 1876, the production reached 1,908 cwts., while in 1890 the Monte Amiata district produced 8,837 cwts., of which quantity five-sixths must be credited to the Siele mine, the balance being the production of some mines in the same district of secondary importance, which were discovered in recent years. The total production of the quicksilver of Monte Amiata during the years 1866-93 is put at 86,507 cwts., of the approximate value of 800,000*l.*, the great bulk of which has come from the Siele mine, which continues to the present day as productive as ever according to all reports.

The splendid success of this mine, while it stimulated research

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B 2

The success
of the Siele
Mine led to
lawsuits.

for the same mineral in the surrounding territory (which in some cases has met with favourable results) was also the cause of a plentiful crop of lawsuits before the Italian courts, involving disputes as to the rights of property in the mine: but prolonged litigation only proved that the title of its present proprietors could not be successfully called in question.

Quicksilver
discovered at
Capita
50 years ago.
A mine
opened by a
Cornish
mining
"Captain."
The work
abandoned in
1867.
And opera-
tions com-
menced in
1893 by
Messrs. Rae
Brothers.

In connection with quicksilver mining it may be mentioned that some 50 years ago quicksilver was discovered at a place called Capita, about 12 miles from the town of Orbetello, on the south-western boundary of the province of Grosseto. A mine was opened up under the management of a Cornish mining "captain" named Davy, and for account of an Englishman. Some quicksilver was produced, but for some reason or other the work was abandoned in 1867, and continued so until 1893, when the mining rights were acquired by Messrs. Rae Brothers, of Leghorn, and operations of a prospecting character were commenced. The geological formation is the same as that of the mines of Monte Amiata, and the abundant indications of cinnabar met with so far, encourage the expectation that the mineral in paying quantity will be found as the workings advance.

ELBA.

The Iron Ores of Elba.

An English
firm con-
tracted to
take the
whole output
for 3 years.

The supposed
price per ton.

With reference to the iron mines of the Island of Elba, it is reported that a contract was entered into last year between the present lessee of the mines and a firm of ore merchants at Middlesbrough for the whole output during a period of 3 years, that is to say, for about 500,000 tons of ore. The price has not transpired, but is believed to be about 12 lire 50 c., equal with the fluctuating rates of exchange to from 8s. 6d. per ton to 9s. per ton delivered at the usual places of shipment on the island. This price appears high, in view of the prevailing depression in the iron trade generally, and of the total absence of demand from the United States which of late years has been the best market for Elba ore.

The price of
Elba ore in
1872.

It may be noted that before the great improvement in the iron trade of Great Britain which occurred in the year 1872, the iron ores of Elba did not fetch more than 6 lire to 7 lire per ton, but the "boom" of that period sent the price up to what seemed the fabulous figure of 22 lire, or about 16s. 6d. at the then rate of exchange, as usual for the ore delivered at the island shipping places.

The Elba
mines farmed
out.

The Elba mines, which are the property of the State, have for many years past been farmed out for terms of 3 years to 5 years to the highest bidder on the basis of a royalty of so much per ton of ore mined and ostensibly by public tender. Practically, foreigners have been excluded from competing from the view that it would not be convenient that mines which are State property should pass under foreign control and management. The present lessee, Signor

Tonietti di Raffaello, has now been in possession of the Elba mines for a good number of years, having succeeded in distancing all competitors. The royalty paid to the State is about 4 lire 50 c. or Royalty. 3s. 2d. per ton at present exchange. The deposits of ore are all Deposits. superficial, and hence worked as quarries, the cost of production according to reports issued by the Government engineers of mines, Cost of production. ranging from about 1s. 6d. per ton to 3s. per ton, the cheapest ore to extract being the masses set aside by the ancients as unfit for their purposes, and termed "gettate," which require only pick and shovel to get. These masses are now rapidly approaching exhaustion. It is now recognised that the ore deposits do not continue in depth, but cease altogether long before the level of the sea is reached. In 1884, a survey of the Elba mines was made by Government engineers of mines, and it was estimated that the quantity of Estimated quantity of ore remaining. ore remaining to be mined then reached a total of 8,000,000 tons; deducting 9 years' production at the rate of 180,000 tons, there should still remain nearly 6,500,000 tons available.

In this connection it is interesting to note that all thought of utilising the Elba iron ores as the basis for the production in this country of iron and steel would appear to have been definitively abandoned, and the mines are simply leased on a purely commercial Elba ores not used in the manufacture of Italian iron and steel. basis with the sole object of realising the maximum amount possible from the royalty on the ores extracted. This was not the case a few years back, when Italy adopted the system of protection to native industries in accordance with which heavy, and in some instances, prohibitory duties were imposed upon manufactures of iron and steel. Much was then said as to the necessity of emancipating the country from its dependence upon foreign countries for supplies of these materials, particularly of war and ship-building material for the Royal Navy, and in a lesser degree of steel rails. It was projected to erect blast furnaces in the vicinity of the Elba Project of erecting blast furnaces near the Elba mines. mines, and to convert the entire production of ore from these mines into pig-iron which should afterwards be converted into steel, to supply the varied requirements of the country, such as ship-plates, angles, beams, rails, etc. In fact a "projet de loi" Projet de loi. was presented to the Italian Parliament according to which the Government was authorised to grant a concession of the mines of Elba for a long term of years and at a nominal royalty, to such person or persons as should undertake to put up blast furnaces and to smelt all the production of the mines, so that the export of the ore should absolutely cease. But nothing came of it, and the The project abandoned. Bill was withdrawn by the Government. It has been suggested that the prospective loss to the State of the valuable royalties which accrue from the Elba mines, as well as of the duty on imported pig-iron, must have influenced the Government in abandoning the scheme as unprofitable to the Budget.

On the other hand, it is worthy of notice that, on the strength Steel works. of the protective customs duties leviable on imported steel and iron, large steel works have, for some years, existed in Italy, at Savona, and at Terni, the property of the Società degli Alti Forni Fonderie ed Acciajerie di Terni (The Terni Blast Furnaces,

Foundries, and Steel Works Company), and this same company at one time proposed to erect blast furnaces at Civitavecchia to make pig-iron from Elba ores. From want of capital, or from other causes, it did not carry out this intention, and, as a matter of fact, all its production of steel in the shape of rails, plates for ship-building and armour, angles and beams, is entirely manufactured from imported pig-iron obtained from Bilbao, Spain, or from Great Britain and Germany, for the Terni Company, in spite of its name, possesses no blast furnaces at Terni or Savona, except two small dismantled furnaces at the former place, long ago blown out for ever.

But it cannot be said that these works have emancipated Italy from depending on foreign countries for its iron and steel. Since, obviously without imported pig-iron, their operations would necessarily come to a dead stop, while, if it be possible to import pig-iron from foreign countries, that is in time of war, it would be equally possible to import the finished article in the shape of steel manufactures. The only result seems so far to be that the country pays a very high price for its rails, &c. The duty on rails is equal to 2*l.* 8*s.* per ton, and the price of rails, made in Italy, is practically regulated by the cost of imported rails, plus this duty. It has been stated in official publications that the average quantity of rails used in the country is 50,000 tons per annum; as none are now imported, it would appear that Italy is paying (even after the duty on pig-iron is allowed for as going into revenue) something like 100,000*l.* per annum for the privilege of having its rails made in the country, but from foreign pig-iron. If steel-plates and other articles manufactured in Italy under similar conditions be taken into consideration, this amount would be considerably increased.

The customs
duty on rails.

Quantity of
rails used in
Italy
annually.

Mr. Vice-Consul Tonietti reports as follows:—

General
trade.

Slight
increase.

The convict
population.

The trade of the island of Elba for 1893 presents no feature of special importance except the increase in the export of iron ore, which having considerably declined in 1892 has now more nearly approached the average of the last 5 years. The general trade of the island has certainly slightly increased, and this fact is not without credit to its inhabitants, who have only had too much reason to be discouraged by the ravages of the insidious enemy of its best and most important agricultural industry, the phylloxera.

The stability of the import trade of Elba, besides being due to the requirements of the mining and agricultural population, is further accounted for by the large penal settlements which the special advantages of the island have induced the Italian Government to plant there. At Portolongone, on the east coast of the island, the Government has instituted the system of separate cells instead of common dormitories. Indeed, the discipline introduced seems to me to be based on distinctly English lines, and the improvement and moral reform of the convict are aimed at as well as his mere safe custody.

Number of
the convict
population.

The convict population of Elba, including the neighbouring island of Pianosa, which forms part of one of the Elban communes,

amounts to 3,000, and when all the improvements of the prison at Portolongone are carried out, the convicts will number over 4,000.

From Annex A. it will be seen that whereas the tonnage of steamships which have called at the island is much in excess of the figures for 1892, the number of such vessels has but slightly increased. This increase in the tonnage is in part due to the fact of the increased export of iron ore, the vessels chartered for this purpose being large in comparison with the small Italian steamers that call at the island, and further, to the fact that larger steamers are now employed in running between the mainland and Elba. The Sardinian steamer has also begun to call here once a week, and the daily mail-boat between Piombino and Portoferraio is now a steamer of much larger tonnage. But apart from the regular Italian service, steamers of the British mercantile marine are the only foreign vessels engaged in appreciable number in the Elba trade.

Although the export of iron-ore has this year been in excess of last year's figure, yet the condition of this branch of trade cannot exactly be described as flourishing. As in the past year, so in the present, the amount of 180,000 tons, which the lessee is allowed by contract with the Government as his annual output, was not exported, but the lessee will be at liberty to dispose of some 250,000 tons in 1894 to make up for the deficit of the years 1892 and 1893. But will this be possible, seeing that the export to the United States of America, once so considerable, has now very seriously declined ?*

The experiment of sending a cargo of Elban ore to France, to which I referred in my last report, has led to no good result, and this, I fear, is to be attributed to the unfortunate strained commercial relations existing between France and Italy. On the other hand, there are symptoms that Belgium seems to be inclined to resume the consumption of the ore which it required in the past, but unfortunately Italian requirements for ore have led to no demand for the ores of Elba, and it is British trade alone that has substantially kept alive the mining industries of this island.

In addition to the phylloxera, severe hailstorms have this year contributed to ruin the viticulture of a great part of the communes of Portolongone and Portoferraio. But notwithstanding, the export of Elba wine has steadily maintained its average, and gratifying symptoms show that it is being more and more appreciated. The quantity of fresh grapes exported is, however, less, as the principal export of grapes has always come from those communes which have been most damaged by hail-storms.

The battle against the phylloxera continues to be energetically pursued, and this year (1893) about 100 hectares of vineyards have been planted with the sturdy American vine, the result being eminently satisfactory, especially as to the quality of the fruit which is abundant.

* See my special report on the Iron Ores of Elba, in which particulars are given of the recent contract entered into between the lessee and an English firm.—W. P. C.

Olives.

The olive is being more regularly cultivated in the island, and large plantations have been instituted this year.

Anchovy,
sardines, and
tunny.
Salt, granite,
quartz, and
clay.
Imports.

The anchovy and sardine fisheries have been abundant and profitable, but the tunny fishery has not paid its expenses. The export of salt, granite, quartz, and clay has remained within normal limits.

If the imports of the past year show a slight improvement this is solely attributable to a small increase in the population, for the island only imports what it is not itself able to produce.

Annex A.—RETURN of all Shipping at the Ports of Elba during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	518	46	60,018	47	60,536
Italian	1,385	30,449	1,105	191,067	2,490	221,516
French	...	...	2	2,576	2	2,576
German	...	...	1	1,703	1	1,703
Total	1,386	30,967	1,154	255,364	2,540	286,231
.. for the year preceding ...	1,852	31,175	1,062	141,774	2,917	172,949

CLEARED.

Nationality	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	518	48	60,812	49	61,330
Italian	1,319	31,942	1,096	193,680	2,415	225,192
French	...	...	2	2,576	2	2,576
German	...	...	1	1,703	1	1,703
Total	1,320	32,460	1,147	258,741	2,467	260,804
.. for the year preceding ...	1,855	32,629	1,074	145,666	2,929	178,285

Annex B.—RETURN of the Principal Articles of Export from Elba during the Years 1893–92.

Articles	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Iron ore	163,224	76,300	128,964	60,782
Wines	7,580	60,100	7,673	53,894
Grapes	640	4,620	660	5,080
Salt	2,000	28,000	2,000	28,000

RETURN of the Principal Articles of Import into Elba during the
Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Cereals	4,193	51,930	3,881	49,210
Cattle	1,540	15,000	1,570	16,700
Building materials ..	4,496	6,400	3,530	5,900
Olive oil and petroleum	440	16,000	406	15,940

Annex C.—TABLE showing the Total Value of all Articles Ex-
ported from and Imported to Elba from and to Foreign
Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
England	54,000	11,000	..	..
Italy	87,408	70,276	117,330	113,742
France	1,860	..	..	..
Switzerland	2,000	..	..	..
United States of America	5,420	53,000	..	..
Belgium	13,953	..	..	..
Argentine Republic ..	38,000	36,000	..	..
Egypt	500	..	..	..
Total	203,141	170,276	117,330	113,742

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AND FINANCE.

ITALY.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE CONSULAR DISTRICT OF
CAGLIARI.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1214.

*Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.*

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ITALY.

CAGLIARI.

Mr. Eugene Pernis to the Earl of Kimberley.

My Lord,

Cagliari, April 30, 1894.

I HAVE the honour to transmit to your Lordship my Report on the Trade and Commerce of the Province of Cagliari for the year 1893.

I have, &c.
(Signed) E. PERNIS.

Report on the Trade and Commerce of the Province of Cagliari for the Year 1893.

ABSTRACT of Contents.

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Agriculture.

In the year 1893 the bad weather and, above all, the persistent drought caused considerable damage to agricultural products in the Island of Sardinia; those that suffered most were horse beans, barley and corn crops, which turned out much below the average.

(1751)

A 2

Fortunately, owing to the considerable imports of corn from Russia, about 18,000 tons, and the flour received from Liguria and the Bologna district, the dearth and want were in some measure avoided, and the price of bread was kept to its normal figure, otherwise the want of such important commodities would have produced most disastrous effects, especially among the lower classes.

The drought damaged also the cattle-breeding trade, owing to the dearth of pastures, and the orchards and vineyards suffered also from the want of rain; no doubt they would have yielded at least one-third more fruit and grapes had they received the necessary moisture, nevertheless, through the vast extension of our vineyards, the vintage was very plentiful, giving a good wine crop, which permitted the exportation, simply from the province of Cagliari, to the Italian continent and foreign countries of 3,558,962 imperial gallons of red and white wine.

Mines and
mining.

In the campaign for 1892-93 the mines and foundries in active operation were 88, which gave an output of 158,302 tons of mineral ores for the total value of 606,734*l.* as shown in Annex A.

The most important production has been that of calamine ore, of which the total output was 115,900 tons valued at 395,480*l.*, the next largest production being that of lead ore, that amounted to 27,890 tons valued at 156,920*l.*

Noteworthy is also the quantity of silver lead ores extracted, viz., 1,236 tons for 47,080*l.*

These results, when compared with those of the preceding mining campaign, show that in the campaign for 1892-93 the output was inferior by 15,429 tons of mineral ores, giving a decrease in the total value of 230,182*l.*

The decrease in the value is represented by about 127,600*l.* in the calamine ores, and 69,040*l.* in lead ores, and 22,080*l.* in silver lead ores.

Of the foundries and smelting furnaces in active operation there was only one, called "Su Suergiu," near "Villasalto," which smelts the antimony ore produced from the mine bearing the same name and that brought out from other small mines, the quantity of sulphuret of antimony produced was 383 tons, and 28 tons of oxide of antimony for the total value of 6,480*l.*

At the end of the campaign for 1892-93 there were used in the mines and annexed workshops and smelting furnaces 81 motors, of which 77 were steam motors, having the total power of 2,372 horses, and 4 were hydraulic motors having an aggregate power of 95 horses.

The fall in the prices, especially of lead ores and calamines, brought on by foreign competition, caused a reduction of work in some mines and the complete cessation of work in others, with the dismissal of about 1,300 miners and labourers.

In the campaign of 1892-93 were employed in the mines 10,550 persons, divided as follows :—

Description.						Number of Persons.
Adult males	..	..	..	..	..	9,024
Males under 15 years	..	..	..	..	..	598
Adult females	..	..	..	..	..	712
Females under 15 years	..	..	..	..	..	216

giving, as said above, a total of 10,550 persons, whilst in the previous campaign the persons employed were 11,820.

It is believed in general that if the prospectors, the concessionaires, and those that have the working of the mines, received more encouragement from Government, there would be, no doubt, a revival and renewed activity in the mining business, and Italian and foreign capitalists would then be induced to invest their money, now lying idle for want of investments; but the Government, instead of helping the development of the mines places in the way all sorts of obstacles, consisting in long, tedious, and costly practices created by the too strict application and interpretation of the laws that have reference to mines.

Of the lead ore shipped to foreign countries in 1893, 1,533 tons were sent to Belgium, 105 tons went to England, and 3,401 tons to Holland.

Of the zinc ores there were shipped to Belgium 100,261 tons, to England 1,800 tons, and to France 115 tons.

Unfavourable weather and bad seas were the cause of heavy losses sustained in 1893 by the proprietors of the fisheries. Tunny fisheries.

The quantity of fish taken near Carloforte and Oristano was very small; consequently the quantity of tunny under oil and salted, which is usually shipped to the Genoese coast, hardly reached 417 tons, showing a decrease of 607 tons on that of 1892.

Such poor results show the risky nature of this industry, and how sometimes the capitals and perseverance of the Genoese speculators are sorely tried.

As I had occasion to state in some of my previous reports, the coral business had in bygone times a certain importance in the Island of Sardinia, both in the number of coral boats that were engaged in the fisheries and with respect to the quantity and quality of the coral that was brought up. Coral fishing.

To-day, owing to the competition of the coral of inferior quality, the scarcity of coral fished, and the slight profits to be realised in this industry, there has been a considerable decline in the coral business.

The fishing near and about Carloforte was carried on during 1893 by 21 coral boats, manned by 115 seamen or fishermen, of which one-half were from Carloforte, and the other half hailed from Genoa.

The net quantity of coral fished was 994 lbs. avoirdupois, of good quality, valued at 1,620*l*.

(1751)

Imports.

Passing on to the commercial movement, we may note that in Annex B the goods and merchandise imported in 1893 represented the sum of 289,220*l.*, whilst in the previous year they were represented by the sum of 307,413*l.* The decrease was due to a fall in the imports of wool, silk, hides, metals, and hardware, and also in glass-work, majolica ware, and crockery.

The detailed list of the principal goods that formed the imports of 1893 is as follows:—

Articles.	Value.
	£
Coffee	85,768
Cotton and cotton fabrics	2,144
Wool and woollen tissues	8,718
Timber, rough and squared	16,023
Skins and works in leather	1,778
Petroleum	8,361
Pig-iron, steel, iron, tin, rails, machinery, and tools	14,452
Ropes	479
Coal (mineral)	82,445
Chalk, cements, building material, earthen- ware, and glassware	1,447
Wheat and grain	160,340
Dried fish, lard, and cheese	2,835

The countries from which the above products were imported are:—Russia for the corn; America for the coffee; England sent the coal; Austria and Sweden the timber; France the woollen fabrics, the squared timber, iron and steel, cements and coal.

Exports.

Annex C shows also by categories the merchandise that was exported during the year 1893, which represented the value of 514,151*l.*

This sum was inferior to the exports of 1892 by 235,016*l.*, such decrease being caused by a fall in the charcoal exports and the quantity of hides and skins exported, but more particularly to the lesser quantity of mineral ores exported, owing to the fall in their prices, as we have said before.

The principal products and merchandise that were exported during the year 1893 consisted of:—

Articles.	Value.
	£
Wine in casks.. ..	37,934
Salt	11,628
Charcoal	48,000
Cork	3,708
Hides and skins	9,704
Mineral ores	371,069
Coloured earths	730
Grain, corn, bean	880
Almonds	20,997
Cheese.. ..	6,205
Bones and manure	1,628

The greater part of the wine was sent to Austria; the salt went to America, Russia, and Norway; the charcoal was shipped to Spain; the cork, hides, beans, almonds, bones, and manure was exported to France.

The mineral ores, as I have mentioned before, were shipped to Belgium, Holland, England, and France. The cheese was exported to Africa and Malta.

In Annex D is shown in detail what was the nature of the goods imported from England, which amounted to 33,334 tons for the value of 38,923*l.*; and in Annex E are noted the goods and merchandise shipped to Great Britain, amounting to 1,962 tons for the value of 8,986*l.*

Shipping and Navigation.

From Annex F will be perceived that the navigation with foreign ports for commercial operations was carried on by 682 vessels, having the total tonnage of 320,485 tons.

Dividing this quantity in arrivals and departures, we have for the arrivals 344 vessels, representing 137,307 tons, and 338 vessels that sailed from our ports, representing 183,178 tons.

The sailing vessels that arrived and sailed from our ports were 410, of 99,600 tons in total; whilst the steamers were 272 for 220,885 tons.

In the navigation and shipping movement the Italian flag holds the first place; then by order of importance come the British flag (although in 1893 the arrivals of British vessels at this port diminished much on account of the wheat trade from the Black Sea to this port having been absorbed by Greek steamers, which the shippers prefer to charter, being interested in their property), the Greek, American, Swedish and Norwegian, Belgian, Dutch, French, and Austrian flag.

ITALY.

Annex A.—MINERAL Production of the Mines of the Island of Sardinia during the Years 1892–93.

Ores.	Mines at Work.	Production.	
		Quantity.	Value.
	Number.	Tons.	£
Lead	68	27,890	156,920
Zinc		115,900	395,480
Argentiferous	8	1,236	47,080
Antimony	4	26	464
Iron	1	..	..
Manganese	2	40	54
Lignite	4	13,210	6,736
Total	87	158,302	606,734

Annex B.—COMPARATIVE Table of Imports at the Various Ports of the Province of Cagliari during the Years 1892–93.

Categories.	Articles.	Value.	
		1892.	1893.
		£	£
I.	Spirits, beverages, and oils	7,560	9,438
II.	Colonials, drugs, and tobacco	35,326	36,000
III.	Chemicals, medicinals, resins, and perfumery.. ..	1,802	1,216
IV.	Colours, paints, and dyes	456	462
V.	Hemp, flax, jute, and other fibrous grasses, except cotton	516	745
VI.	Cotton	4,734	2,184
VII.	Wool and hair	6,281	3,713
VIII.	Silk	332	51
IX.	Timber and straw	17,684	17,924
X.	Paper and books	207	172
XI.	Hides and furriery	2,123	1,773
XII.	Metals, manufactures of, and minerals	44,870	14,452
XIII.	Stones, earthenware, and glass.. ..	36,235	33,896
XIV.	Cereals, flour, &c.	143,331	161,127
XV.	Live animals and animal produce ..	4,220	4,003
XVI.	Sundries	1,786	2,064
XVII.	Precious metals	..	..
	Total	307,413	289,219

Annex C.—COMPARATIVE Table of Exports at the Various Ports of the Province of Cagliari during the Years 1892–93.

Categories.	Articles.	Value.	
		1892.	1893.
		£	£
I.	Spirits, beverages, and oils	16,288	37,934
II.	Colonials, drugs, and tobacco	79	67
III.	Chemicals, medicinals, resins, and perfumery	10,157	11,850
IV.	Colours, paints, and dyes	82	..
V.	Hemp, flax, jute, and other fibrous grasses, except cotton	..	..
VI.	Cotton	..	..
VII.	Wool and hair	..	87
VIII.	Silk	..	..
IX.	Timber and straw	66,411	52,492
X.	Paper and books	..	..
XI.	Hides and furriery	13,433	9,704
XII.	Metals, manufactures of, and minerals	621,503	371,069
XIII.	Stone, earthenware, and glass	60	730
XIV.	Cereals, flour, &c.	7,799	22,115
XV.	Live animals and animal produce ..	13,354	8,102
XVI.	Sundries	..	..
	Total	749,166	514,150

Annex D.—GOODS Imported at Cagliari from Great Britain and British Colonies during the Year 1893.

Categories.	Articles.	Quantity.	Value.
		Tons.	£
II.	Confectionery, preserves, tea biscuits, and tea	1	62
III.	Nitrate of soda, empty cartridges, and soap	15	258
IV.	Colours, paints, and dyes	3	123
V.	Ropes	1	75
VI.	Coloured or dyed tissues, bleached, printed, or sewed	7	1,350
VII.	Woollen combed tissues, carded or printed	1	337
X.	Paper hangings	..	26
XII.	Iron tools, steel, copper, and brass, machinery, &c.	389	3,554
XIII.	Stones for building, brickwork, lime, coals, &c.	32,884	32,387
XV.	Salted and smoked beef, salted and smoked fish	31	750
	Total	33,332	38,922

Annex E.—GOODS Exported at Cagliari from Great Britain and British Colonies during the Year 1893.

Categories.	Description of Goods.	Quantity.	Value.	Remarks.
		Tons.	£	
XII.	Lead ores	105	591	} To England.
XII.	Zinc	1,800	6,142	
XV.	Horses (20)	..	152	
	Cheese	55	2,101	To Malta.
	Total.. ..	1,960	8,986	To Malta.

Annex F.—RETURN of all Shipping at the Ports of the Province of Cagliari during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	42	38,292	42	38,292
Italian	212	35,418	54	37,070	266	72,488
French	...	...	1	940	1	940
Austro-Hungarian	1	150	1	574	2	724
Swedish and Norwegian	...	...	2	1,554	2	1,554
Russian	...	...	...	...	...	...
German	...	...	2	1,956	2	1,956
Belgian	...	...	...	...	...	...
Spanish	...	...	1	823	1	823
Dutch	...	...	6	5,809	6	5,809
Greek	...	...	...	...	...	...
American	9	3,822	...	...	9	3,822
Sundry others	5	3,505	8	7,404	13	10,909
Total	227	42,895	117	94,412	344	137,307

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	59	55,730	59	55,730
Italian	165	47,418	65	42,835	230	90,223
French	...	...	1	940	1	940
Austro-Hungarian	1	150	1	574	2	724
Swedish and Norwegian	...	...	5	4,927	5	4,927
Russian	...	...	...	...	...	...
German	...	...	4	3,268	4	3,268
Belgian	...	...	3	3,018	3	3,018
Spanish	...	...	5	3,685	5	3,685
Dutch	...	...	7	7,027	7	7,027
Greek	...	...	9	3,822	9	3,822
American	...	...	5	4,499	13	9,814
Sundry others	...	...	...	...	...	...
Total	183	56,705	155	126,473	338	183,178

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ITALY.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF SICILY.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1243.

*Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.*

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ITALY.

PALERMO.

Consul Dupuis to the Earl of Kimberley.

My Lord, *Palermo, May 7, 1894.*
I HAVE the honour to forward, herewith enclosed, Shipping
and Trade Returns for this District for 1893, together with a
brief Report on the same.

I am, &c.
(Signed) H. LEWIS DUPUIS.

*Report on the Trade and Commerce of the Consular District of
Palermo for the Year 1893.*

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British
shipping

The returns of British shipping for the year 1893, both in number and in tonnage, show that the decrease referred to in previous reports still continues, as the following figures show:—

Year.	Number of Vessels.	Tona.
1889	407	445,800
1890	395	427,682
1891	360	399,098
1892	348	379,307
1893	265	321,794

It should be noted that these figures are taken from the consular registers, which do not give the exact number of British vessels entering this port, because for some years past British vessels arriving and leaving within the 48 hours prescribed by the Merchant Shipping Act, 1854, do not deposit their articles at the consulate, with the object of avoiding the payment of 2s. 6d., the fee for depositing their papers. Nevertheless this circumstance does not do away with the fact that British shipping at Palermo is falling off.

There was also a decrease last year at Messina, at Catania, at Girgenti, and at Trapani, due in part to the competition of other flags, as will be noticed hereafter, but due principally to the prevalence of cholera here last summer and autumn, and the quarantine restrictions imposed by many countries, especially the United States, against arrivals from Sicily. This naturally had a deterrent effect on the movements of British vessels trading with this island.

British shipping was stationary at Marsala, but increased at Syracuse, between which latter port and Malta the postal sailings by British steamers have been augmented to five times a week.

Of the 285 vessels that entered Palermo, 54 were from Great Britain, 32 with coal and 22 with general cargoes, *i.e.*, a decrease of 33 coal-laden ships and of 8 with general cargoes as compared with 1892. Entered.

Of the 285 vessels that cleared, 92 were for Great Britain and 193 for foreign countries. The departures to English ports during 1892-93 were respectively as follows :— Cleared.

Port.	Number of Vessels.	
	1892.	1893.
London	42	30
Liverpool	34	31
Hull	19	22
Glasgow	6	5
Bristol	2	1
Dundee	1	..
Plymouth	..	1
Malta	..	1
Montreal.. .. .	3	1
Total	107	92

And the departures for foreign countries were:—

Country.	Number of Vessels.	
	1892.	1893.
Italy	88	66
United States	97	92
Turkey	34	21
Spain	11	6
Greece	4	1
Egypt	2	..
Russia	2	1
Roumania	1	3
Portugal	1	..
Belgium	1	..
France	1	2
Austria	..	1
Total	242	193

Foreign
shipping.

But when we turn to the foreign shipping we shall find, as already alluded to, an evident explanation of the falling-off of British shipping at this port in the increase of the German, Austrian, and Belgian flags.

German.

The ships under this flag have increased from 23 to 48, owing to the establishment by the Norddeutscher Lloyd Co. of weekly steamers between this port and Naples and Genoa, as well as occasional steamers between Palermo and North American ports.

Austrian.

These ships have also increased from 21 to 47, due to the fact that the "Adria" Austrian Steamship Company runs a regular weekly service between Marseilles, Genoa, Trieste, and back, calling at Palermo both ways, and, moreover, has occasional steamers for London and Glasgow.

Belgian.

The vessels of this nationality rose in 1893 to 32, from 10 in 1892, and traded between the Sicilian ports and Antwerp, &c.

Greek.

There were 23 vessels in 1893, as against 9 in 1892, mostly from the Black Sea and Danube, with grain cargoes.

Freights.

Since my last report there is little to state under this head. Freights hence to the United States ports have remained rather low, fluctuating between 19s. to 23s. 6d. on the net register of steamers employed.

For many years the carriage of all freights between Sicily and the United States has been almost monopolised by British steamers (apart from the more or less regular sailings of the Italian Navigazione Generale Company), but, as stated, new competitors have now entered the field in the steamers of the North German Lloyd and Hamburg-American Companies. These steamers are beginning to call at intervals at Palermo, and although they have not yet done much in relieving British tonnage of their cargo, their chance of development in the trade appears to be considered fair. The means of sea communication

between this port and all countries with which Sicily has commercial intercourse continue to be ample and abundant, and no inconvenience is ever felt through want of tonnage.

The total exports from Palermo in 1893 increased by 57,240*l.*, ^{Exports.} and the articles that contributed to this increase were wine, lemon-juice, manna, and others.

The countries to which there was an increased exportation were France, Germany, United States, Russia, and Belgium, while the countries that received less were Great Britain, Austria, Holland, and Turkey.

The respective figures of increased and decreased exportation were as follows:—

		Country.	Value.	
			£	£
Increase	France	58,840	180,491	
	Germany	2,640		
	United States	50,821		
	Russia	992		
	Belgium	3,877		
	Other countries	63,821		
Decrease	Great Britain	62,329	123,251	
	Austria	31,360		
	Holland	29,522		
	Turkey	40		
Net increase		..	57,240	

Though the accompanying table shows that the shipments to ^{Green fruit.} the United States have exceeded by far the quantities shipped in previous years, the year ending September 30, 1893, was an unfortunate one for speculators and shippers. In order to keep up a fictitious credit they shipped in excessive quantities and without proper criterion. The American markets had not quite recovered from their own financial crises when they were flooded with Sicilian fruit, and prices therefore fell. Only a few shippers on this side were able to withstand the disastrous consequences. During the last quarter of 1893 and the beginning of 1894 some understanding appears to have been made among shippers to regulate shipments and secure profitable prices, but it does not seem to have been of a permanent character. The yield of lemons in Sicily is now so enormously in excess of the demand from abroad that the prices realised in the American and English markets are not remunerative either to growers or merchants, and the fruit is left on the trees.

The yield of oranges was not so abundant, and not equal to the demand. Prices ruled higher, and to a certain degree compensated growers for the losses they had sustained previously.

ITALY.

Shipment of Green Fruit in Boxes to the United States from Palermo during the Year 1892-93.

Month.	New York.				Boston.		Philadelphia.		New Orleans.		Baltimore.		Total.	
	Oranges.		Lemons.		Oranges.		Lemons.		Oranges.		Lemons.		Oranges.	
	Boxes.	Boxes.	Boxes.	Boxes.	Boxes.	Boxes.	Boxes.	Boxes.	Boxes.	Boxes.	Boxes.	Boxes.	Boxes.	Boxes.
1892														
October	1,099	84,691	7,374	92	92	7,374	5,736	2,736	1,001	10,209	2,250	1,101	44,801	44,801
November	29,803	41,198	9,840	12,492	12,492	5,165	5,736	10,209	11,207	47,752	3,859	62,880	72,183	72,183
December	56,784	56,137	11,727	19,378	19,378	10,084	8,465	4,752	11,207	4,752	..	96,453	123,081	123,081
1893														
January	24,739	87,321	18,427	19,157	19,157	5,912	6,108	12,085	1,773	12,085	2,784	51,581	73,941	73,941
February	42,861	74,213	28,615	26,787	26,787	4,354	8,869	27,516	1,126	27,516	..	77,882	132,344	132,344
March	71,129	92,889	16,081	16,081	16,081	14,179	25,396	25,542	1,707	25,542	..	103,696	152,419	152,419
April	62,157	187,820	22,854	22,854	22,854	6,844	12,151	57,772	2,950	57,772	195	95,000	226,464	226,464
May	37,484	167,612	39,699	39,699	39,699	1,926	10,302	46,524	1,102	46,524	..	79,811	261,606	261,606
June	1,427	180,029	71,399	11,619	11,619	1,125	40,325	22,386	380	22,386	..	14,501	315,245	315,245
July	..	140,552	22,639	..	..	..	..	..	..	..	..	107	103,182	103,182
August	..	46,901	5,675	..	..	..	..	..	..	..	..	..	60,976	60,976
September	..	3,767	..	..	..	..	..	..	..	..	..	..	3,767	3,767
Total	326,629	1,004,230	168,759	76,121	168,759	48,689	117,352	252,752	21,196	252,752	6,838	572,102	1,630,022	1,630,022
Total, 1891-92	129,861	852,517	169,887	76,121	169,887	16,951	86,492	233,391	7,987	233,391	1,489	232,409	1,360,543	1,360,543

Owing to the extreme dryness of last year the crop of 1893 ^{Sumach.} was far below the average, but the quality was good, the leaves containing a greater proportion of tannin. The prices consequently rose considerably, as compared with the low prices realised during the last few years. The enhanced cost affected the demand from the United States and Great Britain, but notwithstanding the reduced exportation to those markets prices remain firm.

The details of exportation were:—

Country.	Quantity.	
	Ground Sumach.	Sumach in Leaf.
	Cwts.	Cwts.
Great Britain	259,841	11,682
France	93,626	232,663
United States	78,323	18,327
Austria	13,731	12,641
Holland	10,449	..
Germany.. .. .	3,816	15,321
Russia	..	6,501
Other countries	2,127	3,908
Total	461,913	301,043

Last year's dryness, alluded to frequently in this report, was ^{Oils.} also the cause of a reduced yield in olives, hence the exportation of oil, of which I subjoin figures, was less in 1893 than in 1892. The coarser kinds of oil are sent to the United States and Great Britain where I am told they are employed for lubricating machinery, &c., and in the manufacture of soaps, while the finer kinds are sent to France, Holland (for Germany), &c.

1893.

Country.	Quantity.
	Gallons.
France	93,412
United States	69,912
Holland	18,176
Great Britain	5,236
Other countries	10,098
Total	196,834

The custom-house returns show that the exportation of wine ^{Wine.} from Palermo was in 1893 double what it was in 1892. This appears to be particularly the case with the shipments to Austria, owing to the facilities afforded by the existing treaty with that country. The shipments to different countries were as follows:—

1893.

Country.						Quantity.
						Gallons.
Austria	..	..	..	..	..	1,992,540
Great Britain	..	..	..	..	..	81,400
South America	..	..	..	..	..	73,238
France	..	..	..	..	..	72,446
Germany	..	..	..	..	..	25,432
Other countries	..	..	..	..	..	94,138
Total	..	..	..	..	..	2,339,194

Besides these, there have been increased shipments to the north of Italy for transmission to Switzerland and Germany.

As is well known, the cultivation of the vine has hitherto been a source of immense wealth to Sicily, but great anxiety now prevails in consequence of the spread of phylloxera. This seems to be particularly the case with the province of Syracuse and also in that of Catania, as Vice-Consuls Bisani and Elford point out in their reports hereto attached. In many districts, vine growers have had to destroy their vines and find themselves unable to meet their obligations, the taxes, &c., and have had to reduce wages and labour. The labourers feel the effects more keenly: their wages had in some places risen to 2 lire (1s. 6d.) per day besides their food; now they think themselves fortunate if they can earn 70 c. or 90 c. (7d. or 8d.) without food. The long intervals between the periods of work connected with viticulture have become longer, and the little employment labourers do occasionally find does not enable them to pay off the debts they are forced to contract to meet their daily wants. This relates to those districts that have been visited by phylloxera.

Sulphur.

The following table exhibiting the quantity of sulphur exported during the last 3 years shows that the exportation of this article is always on the increase, notwithstanding the fact that the constant excess in the output has a depreciatory effect on the value. Much attention has been devoted to this subject by the Italian and Sicilian press, and by Parliamentary Deputies, and many remedies have been proposed, but so far as I know none of them have been yet adopted.

TABLE showing Exportation of Sulphur from Sicily during the Years 1891-93.

Country.	Quantity.		
	1891.	1892.	1893.
	Cantars.	Cantars.	Cantars.
United States	1,267,122	1,113,719	1,100,599
Great Britain and Colonies ..	319,629	336,426	333,999
France and Colonies	728,476	943,836	1,164,791
Germany	134,189	193,581	186,084
Belgium	64,769	79,152	62,802
Holland	25,258	23,082	41,104
Spain	38,824	74,616	54,703
Portugal	155,212	203,018	189,052
Denmark	827	9,297	24,874
Sweden and Norway	31,770	33,625	64,187
Russia	164,409	187,696	270,032
Greece	164,847	147,958	142,670
Turkey	27,038	49,787	45,560
Austria	133,523	132,055	132,239
South America	2,188	700	315
Italy	551,455	504,236	722,032
Total	3,809,536	4,042,784	4,534,443

The shipments were from the following ports, and in these quantities:—

Port of Shipment.	Quantity.		
	1891.	1892.	1893.
	Cantars.	Cantars.	Cantars.
Port Empedocle (Girgenti) ..	1,742,716	1,700,433	1,990,347
Licata	801,197	799,702	936,186
Catania	1,264,323	1,542,649	1,607,910
Palermo	1,300	..	..
Total	3,809,536	4,042,784	4,534,443

NOTE.—13 cantars = 1 ton.

The value of imports to Palermo increased from 882,087*l.* in 1892 to 1,013,033*l.* in 1893, viz.: by 130,946*l.* The increase was especially noticeable in cereals which alone were 326,989*l.* in 1893 as compared with 147,007*l.* in 1892. This was due to the prolonged dryness experienced in January, February, and March, 1893, which considerably reduced the crops in some places, while it caused them to fail altogether in many others; thus necessitating large importations of wheat from the Danube and Russian ports on the Black Sea.

There was also an increased importation of timber from

Austrian ports in the Adriatic, of colonials and glassware, and of petroleum from the United States.

The countries that benefited by the increased imports to Sicily were Russia, the United States, Austria, and Belgium.

There has been a notable falling off in the importation of cotton, woollen, silken, and linen goods. Coals and hides have also decreased, but in a slight degree. The countries from which there has been a diminished importation are Great Britain, France, Germany, Holland, and Turkey.

The comparative figures of increased and decreased importation are as follows :—

		Country.	Value.	
			£	£
Increase	United States	58,888	267,560	
	Austria	31,350		
	Russia	129,138		
	Belgium	7,618		
	Other countries	46,071		
Decrease	Great Britain	15,853	136,814	
	France	43,744		
	Germany	39,370		
	Holland	11,591		
	Turkey	26,556		
Net increase		..	130,946	

Summarising the comparative figures of exports and imports it appears that :—

				Value.	
				£	
Great Britain has lost in exports	..	..	..	62,329	
" " imports	..	..	..	15,353	
Total loss	..	..	..	77,782	
Germany has gained in exports	..	..	..	2,640	
" lost in imports	..	..	..	39,370	
Total loss	..	..	..	36,730	
Holland has lost in exports	..	..	..	29,522	
" " imports	..	..	..	11,591	
Total loss	..	..	..	41,113	
Turkey has lost in exports	..	..	..	40	
" " imports	..	..	..	26,556	
Total loss	..	..	..	26,596	

whilst :—

	Value.
	£
France has gained in exports	58,340
" lost in imports	43,744
Total gain	14,596
United States have lost in exports	50,821
" " gained in imports	53,383
Total gain	2,562
Russia has gained in exports	992
" " imports	129,138
Total gain	139,130
Belgium has gained in exports	3,877
" " imports	7,618
Total gain	11,495

NOTE.—It should be observed that by "exports" is intended exports from Sicily; and by "imports" the imports into Sicily.

It is to be regretted that the trade with Great Britain, as Trade with shown by the accompanying tables, has not only fallen off during Great Britain. 1893, but has been gradually decreasing during the last decade.

Year.	Value.	
	Imports from Great Britain.	Exports to Great Britain.
	£	£
1884	513,989	411,900
1885	546,310	329,795
1886	426,587	293,880
1887	415,466	310,951
1888	375,698	348,552
1889	327,208	372,124
1890	372,271	326,831
1891	378,178	303,364
1892	310,267	332,623
1893	294,914	270,294

This remarkable depression in the trade with Great Britain as shown by the steady decline in imports during the last decade was referred to in my report of 1892, and I can only repeat that, generally speaking, the causes are supposed to be found in the heavy taxation in Sicily; and the low prices realised for native products which have gradually diminished the purchasing power here. With regard to the year under review, other circumstances

call for notice, the most important being the unsatisfactory state of the public health, and also, it is presumed, the fact that, as one of the consequences of the financial crisis throughout the kingdom of Italy, the customs duties have for some months past been levied in gold instead of paper, thus practically increasing the duties by about 15 per cent., and causing a corresponding rise in the rate of exchange at sight on London. The following table quoting the average ruling rates of exchange would render it manifest that the importation of goods into this port has received a material check.

RATES of Exchange.

Month.						Average Rate of Exchange for Cheques.	
						Lire	c.
January	..	..	..	..	..	26	14
February	..	..	..	..	..	26	16
March	..	..	..	..	..	26	19
April	..	..	..	..	..	26	17
May..	..	..	..	..	..	26	40
June	..	..	..	..	..	26	30
July..	..	..	..	..	..	26	74
August	..	..	..	..	..	26	72
September	..	..	..	..	..	28	12
October	..	..	..	..	..	28	40
November	..	..	..	..	..	28	92
December	..	..	..	..	..	28	50

Agriculture.

The anxiety generally felt last year and to which allusion was made in my report (No. 1243, July, 1893) as to the apprehended failure in crops was unfortunately but too well grounded. I am not in a position to give official figures for 1893, but the subjoined table, giving the produce and value of cereals and other crops for the 5 years ending in 1892, and giving also some of the crops for 1893, obtained from private sources, will amply show the continuous decline in the produce and depreciation in the value of the staple resources of Sicilian labour and income, and in great part explains the causes of the political troubles and riots throughout the island, and which culminated in its being placed under martial law as it exists to the present day. Besides the failure in crops and consequent general depression of trade there should be added the crisis in the sulphur trade, and the appearance of cholera in the autumn with its consequent sanitary restrictions and quarantines.

Emigration.

The immediate effects of the general distress felt throughout Sicily manifested itself in the increase of emigration. The annexed table, though not complete, will suffice to convey an accurate idea of the numbers that have left these shores. Emigrants are mostly drawn from the artisan and the rural population, and their destination is the United States and South America. About half the number is from the province of Palermo.

TABLE showing the Total Agricultural Produce in Sicily during the Six Years ending December 31, 1893.

Produce.		Total Quantities.						Average Prices.						Total Values.					
		1888.	1889.	1890.	1891.	1892.	1893.	1888.	1889.	1890.	1891.	1892.	1893.	1888.	1889.	1890.	1891.	1892.	1893.
								Lire c.	Lire c.	Lire c.	Lire c.	Lire c.	Lire c.	Lire.	Lire.	Lire.	Lire.	Lire.	Lire.
Wheat	Hectolitres ..	5,133,890	5,401,736	6,490,329	7,744,918	4,363,696	4,365,800	17 90	17 44	17 17	19 48	20 17	..	91,896,681	94,206,276	111,438,490	150,871,003	88,015,748	..
Maize	..	18,599	19,264	63,934	67,632	50,775	58,000	11 58	11 32	11 10	13 95	12 40	..	215,376	218,068	709,667	943,466	629,610	..
Rice	..	12,960	15,162	8,336	25,590	14,126	14,100	21 28	20 92	20 58	22 46	23 30	..	275,789	317,189	171,555	574,751	329,136	..
Barley	..	1,023,531	1,145,581	1,933,381	1,511,699	1,153,303	1,153,300	9 90	10 23	10 23	10 23	10 23	..	10,132,957	11,719,294	19,778,488	15,464,681	11,798,290	..
Rye	..	30,707	22,471	43,745	31,631	24,761	..	11 39	11 39	11 39	11 73	11 73	..	349,753	255,945	498,256	371,032	290,447	..
Oats	..	95,993	89,252	216,962	197,918	126,076	..	7 75	8 39	8 23	9 02	8 69	..	743,946	714,016	1,785,597	1,785,200	1,095,600	..
Haricot beans, pease, &c. ..	..	91,600	93,487	98,414	94,809	82,888	..	15 75	15 39	15 23	15 02	15 69	..	1,374,000	1,402,305	1,476,210	1,422,135	1,243,320	..
Beans, vetches, &c.	..	786,686	910,604	1,342,795	1,223,533	793,757	..	15 75	15 39	15 23	15 02	15 69	..	11,800,290	13,659,060	20,141,925	18,352,995	11,906,355	..
Potatoes	Quintals ..	50,200	49,594	67,442	69,312	62,764	..	8 75	8 39	8 23	8 02	8 69	..	401,600	396,752	539,536	554,496	502,112	..
Wine	Hectolitres ..	6,067,502	7,278,772	7,692,191	6,855,555	3,946,535	4,111,331	24 90	26 70	31 25	28 80	29 45	..	151,080,800	194,343,212	240,380,969	197,439,984	116,225,456	..
Oil	..	478,600	206,525	590,095	534,267	401,333	..	79 90	80 80	102 25	90 55	83 85	..	37,809,400	21,535,220	60,337,214	48,377,877	33,651,772	..
Chestnuts	Quintals ..	10,530	31,076	32,791	30,306	33,190	36,371	19 90	18 80	19 25	17 55	17 85	..	725,940	559,368	624,029	515,202	564,230	..
Hemp	..	6,376	6,723	9,539	9,553	9,119	..	70 90	67 80	70 25	73 55	73 85	..	446,320	450,441	667,730	697,369	665,687	..
Flax	..	22,359	33,893	54,985	43,202	53,716	..	100 90	100 80	100 25	98 55	98 85	..	2,235,900	3,389,300	5,498,500	4,233,796	5,264,168	..
Wool	Kilograms ..	22,359	33,893	1,853,996	1,325,545	1,423,633	..	100 90	100 80	100 98	101 07	98 99	..	1,816,886	1,816,886	1,816,886	1,416,301	1,415,901	..
Cheese, &c.	..	22,359	33,893	8,369,330	6,433,852	7,697,757	..	100 90	100 80	100 94	101 21	101 17	..	7,867,170	7,867,710	7,867,170	7,845,462	8,215,533	..
Cocoons	..	154,590	189,617	240,911	174,728	170,482	..	2 70	2 70	2 75	2 80	2 80	..	417,393	511,966	662,505	489,238	477,350	..
Oranges and lemons	Quintals ..	3,009,789	2,584,961	3,116,319	2,963,036	2,614,075	..	18 70	18 70	18 75	18 80	18 80	..	54,176,202	46,529,298	56,093,742	52,848,648	47,053,350	..
Pulse, &c.	..	5,835,102	6,151,261	8,870,992	7,365,244	5,018,750	..	8 60	7 80	6 90	6 90	6 50	..	50,181,877	47,979,836	61,209,845	50,820,184	32,621,875	..
Hay	..	6,907,021	7,522,002	8,330,880	6,636,111	5,531,407	..	8 60	7 80	6 90	6 90	6 50	..	59,400,381	58,671,616	57,479,622	45,789,166	35,954,146	..
Grass	..	16,095,037	18,734,468	18,911,001	14,091,644	12,912,355	..	2 00	1 80	1 60	1 60	1 50	..	32,190,074	33,722,042	30,257,602	22,546,630	19,363,533	..
Total	..	..	..	..	..	..	..	..	..	..	..	..	..	515,538,685	540,265,220	679,434,997	623,359,636	417,288,624	..

N.B.—Hectolitre (liquid measure) = 22 imperial gallons.
 " (cereals, &c.) = 2.75 " bushels.
Quintals = 220 lbs. avoirdupois.
Kilogramme = 2.204 " "
25 lire = 1l.

RETURN of Emigration from Sicily.

Provinces.	Estimated Population on December 31, 1892.	January to June, 1892 (Six Months).			January to June, 1893 (Six Months).			Annual Emigration from all Sicily.	
		Definitive Emigration.	Temporary Emigration.	Total Number.	Definitive Emigration.	Temporary Emigration.	Total Number.	Year.	Number of Emigrants.
Caltanissetta	312,904	33	15	48	100	431	531	1876	1,228
Catania	648,761	137	51	188	893	98	991	1881	1,943
Girgenti	340,534	433	861	1,344	596	339	935	1882	3,215
Messina	509,587	174	907	1,081	40	1,022	1,062	1887	4,653
Palermo	801,204	2,765	634	3,399	3,167	1,704	4,871	1888	7,015
Syracuse	401,224	1	2	3	3	3	6	1892	18,138
Trapani	350,726	56	107	163	12	143	155	..	..
Total	3,364,940	3,649	2,577	6,226	4,811	3,790	8,601	..	..

PALERMO.

MESSINA.

Mr. Vice-Consul Pignatorre reports as follows :—

Trade and Commerce.

Exportation. The principal articles of exportation continue to be wine, olive oil, lemon juice, oranges, lemons, walnuts, filberts, almonds, &c.

Wine. Respecting the usual exports from his Vice-Consular district, the quantity of wine shipped for foreign countries has exceeded that of 1892 by 3,546 imperial gallons, although the production has declined from 1,925,788 to 1,269,224 imperial gallons; a result probably of the exceptional advantages enjoyed by Messina in possessing a deep and secure harbour, in which ships can load with greater facilities than in most other Sicilian ports, which are indeed sometimes mere roadsteads, and Messina thus becomes the natural outlet, especially in unfavourable weather, for the shipment of wines produced elsewhere.

Importation. An augmentation is noticeable on two articles of foreign importation, which should not be overlooked, not so much on account of the actual increase, as on account of the nature of the causes which have occasioned it, viz.:—

Coal. The amount of coal shipped for Messina during the year 1893 has risen from 70,682 to 78,244 tons over the preceding year, and as this rise must be attributed mainly to the extension of railways, tramways, and, in a lesser degree, to some small additional manufactories, it is hoped there will be a progressive and continued demand for an article so indispensably required for the use of the new lines of communication which are being extended every year.

Wheat. On the other hand, the augmented importation of wheat which has reached the amount of 604,418 cwts., an excess over last year of no less than 548,856 cwts., is connected with other causes equally steady in their operation, and which must equally maintain this increase if not removed by the action of Government. The primary cause, he opines, lies evidently in the heavy land tax which occasions a dearth of production, by discouraging many landowners from cultivating cereals, as they should and would do under other circumstances, and which they are unable to vend at the high prices they must perforce demand, in order to meet the expenses of cultivation, plus the land tax; and thus they cannot compete with foreign exporters. Wherefore, this great grain-producing island is at present unable to furnish the necessary amount of corn for its own home supply.

The mean rate of monthly exchange at this place for bills on London at 3 months' date during the year 1893 was per pound sterling as follows :—

RATE of Exchange.

Month.	For Bills on London at Three Months' Date.	
	Lire	c.
January	25	90
February	26	0
March	26	10
April	26	5
May.. .. .	26	5
June	26	10
July.. .. .	27	25
August	27	25
September	27	50
October	28	5
November	28	50
December	28	20

The total number of British merchantmen which entered the port of Messina during the year 1893 reached 340, with a collective burthen of 362,650 tons. Of these, 317 were steamers, with an aggregate tonnage of 359,798 tons, and 23 sailing vessels, with a tonnage of 2,852 tons. Shipping and navigation.

The number of Italian steamers and sailing vessels, including small coasters, which entered the port of Messina in 1893 was 3,793 in all, with a burthen of 1,353,012 tons, showing an increase of 199 vessels, and of an aggregate tonnage of 281,968 tons.

The prolonged and intense drought of the summer of 1893 had a most injurious influence on the produce of the vines, which was both scarce and wanting in quality; so that the vintage gave most unsatisfactory results with respect to the quantity of wine yielded, though the quality was of average goodness. The quantity of wine produced, as above-mentioned, during this period, within the district of the Vice-Consulate of Messina, amounted to 571,692 hectolitres, or 1,269,224 imperial gallons, showing a falling-off of 656,564 imperial gallons as compared with the outcome of the vintage of the previous year. Agriculture.
Wine.

From the same causes the olive crop was also inferior to the usual amount gathered, for, though the blossoms promised fair and a plentiful crop was anticipated, the utter want of rain up to the end of October, 1893, when the first rains fell, viz., on 27, 28, and 29, caused the fruit to dry up and drop from the bough. Olive.

The produce and exportation of these fruits, besides being a most important item of external trade to Sicily, has also from the numerous foreign markets to which they are sent, owing to their intrinsic good quality, and the success attained in the preservation of the fruit during the longest voyages, challenged the attention of foreign exporters and producers. In reply to several enquiries on the subject, Mr. Pignatorre has been able to obtain, through the kindness of friends, some hints on the most proper and advantageous mode of packing, which may not be devoid of Oranges and lemons.

interest to those who cultivate and trade in this fruit. Indeed, the practical knowledge of the Sicilians as to the most suitable method of gathering and packing oranges and lemons has often been recognised, and they have been occasionally hired for the purpose in Greece.

The proper season for picking lemons depends mainly on their destination and on the degree of irrigation.

Thus the first crop is gathered towards the commencement of October on those plantations which are suitably and plentifully watered, a circumstance which naturally contributes to their earlier development; the limit of weight, as fixed by experience, and under which the fruit is not considered ready, is $3\frac{1}{2}$ oz. The October fruit is exported forthwith as it cannot be kept for further maturation.

The second crop is picked in November, and comprises fruit which can be preserved for the most part up to April; until then it is usually stored in special warehouses and then sorted carefully.

The third picking takes place in December, in the same manner and under the same conditions as that of November.

The two last crops are gathered in January and February, and are forthwith shipped; for the fruit under these two categories cannot be preserved for any length of time.

The fruit, in whatever season collected, ought never to be under weight, viz., under $3\frac{1}{2}$ oz., and should be carefully packed in cases made of beech, or other light wood of a similar kind, divided into two equal compartments by a partition, and of various sizes; those containing from 300 to 360 lemons each are the smallest, and are mostly destined for the United States, Hamburg, and Trieste; those containing from 400 to 420 lemons are shipped for French ports; and finally, those containing between 420 and 490 to the United Kingdom. In all cases, the lemons should be properly wrapped in tissue paper, and the fruit most carefully sorted previously; the mouldy or otherwise damaged fruit set aside, and the pedicle cut off, but not torn away.

These remarks apply generally to the gathering, sorting, and packing of oranges; with respect, however, to the proper season for picking, it must be observed that the orange trees growing on the same site are gathered at once and not in successive pickings. The suitable time depends again on the locality, and varies with the height above the sea-level on which the trees have been grown. Thus the fruit in the lowlands is ripe for use in the month of November; that on the uplands in December and January, and finally, that on the mountains matures between February and April. The cases in which the fruit is laid contain each from 160 to 300 oranges, and are shipped to all parts of the world, and almost always reach their destination in a good state of preservation.

Phylloxera.

The following communes in the province of Messina were ascertained to be still on December 31, 1893, infested by phylloxera, and whence no vegetables or plants are allowed to be

exported, viz., Ali, Banso, Calvaruso, Capizzi, Caronia, Condro, Gualtieri, Filicudi (Island of Lipari), Messina, Milazzo, Mistretta, Reitano, Rocca Valdina, Rometta, Salina, S. Filippo, S. Lucia, San Pier Niceto, S. Stefano, Saponara, Spadafora, Susa, Valdina, Venetico.

Population and Industry.

The population of the city of Messina, with suburbs and adjacent villages, has reached the number of 145,202, as ascertained from the excess of births over deaths, according to the estimates drawn up by the registrar of Messina, in the month of November, 1893. Population.

The manufacture of macaroni and vermicelli has received lately a fresh impulse; several manufacturers have substituted for the ancient manual labour, steam and gas, and the quality of the paste is equal to that produced at Naples, and therefore of an excellent quality. Industries.

The average market price is 50 c. per kilo.

Public Works.

The Messina-Cerda line now open to the public since November 20, 1893, extends as far as Naso-Capo d' Orlando, over a distance of 93 kiloms. (57 English miles 6 furlongs). The length added since the period of my last report (1892) is of 14 English miles and 7 furlongs. Railway.

The Messina-Barcellona Tramway was completed in the month of May, 1893, and opened to the public on May 31. The entire length of this new line of communication is 60 kiloms. (37 English miles 2 furlongs). Tramways.

The slaughter-house already mentioned in his report of 1890 was completed and brought into use on June 2, 1893. It is constructed of freestone and situated near the beach beyond the railway station, and to the south of it, on a site called the "Mare Grosso." Slaughter-house.

Both the structure itself and its situation are great improvements over the old system, when animals were slaughtered at a spot called Porta Bocchetta, within the city precincts, and occasionally here and there in the country.

The taxes leviable on behalf of the communal administration for each head of cattle are rated as follows:—

Description.				Amount.	
				Lire	c.
Ox, cow, or bull	..	..	..	3	50
Bullock or calf	..	..	..	2	50
Pig ..	..	..	..	2	0
Sheep, goat, or ram	..	..	..	0	40
Lamb or kid	..	..	..	0	20

General Remarks.

Custom-house
dues.

These are considered both heavy and ill-advised in some respects, so much so that importation is seriously hampered and smuggling fostered indirectly; for the dues are, I am told, sometimes so excessive that the claimant of the goods or consignee may prefer to abandon them rather than take consignment. As two cases in point, he can quote the following instances, for the truth of which he can vouch.

A few second-hand and incomplete books, with four also second-hand packs of playing cards arriving from England, were charged, the first at 10 lire 30 c., plus the carriage and commission forming a total of 14 lire 70 c., levied on goods which if sold would probably have fetched a smaller sum than the duty paid; the sum charged on the cards was so excessive and certainly in excess of their value that they were not accepted but left at the custom-house.

On another occasion, the captain of the British steamship "Kate," of Whitby, and the masters of some other British vessels, required the use of their own paint to re-coat their vessels, this had been already sealed up by the custom-house officials, against its conveyance on shore; and they were unable to obtain the necessary permission of the director of customs, although the provisions of the regulation affecting the point at issue simply state that the required paint cannot be carried on shore, and does in no wise prohibit its employment on board, either expressly or impliedly; and a written application to the intendant of finance was met by a flat refusal on the ground that a discretionary power was vested in the director of customs, who could, therefore, grant or withhold his assent for the use of the paint as he should judge expedient. It is, therefore, evident that no master can utilise his own paint on board when in port without the payment of the same dues which would have been levied had it been conveyed on shore, and must perforce repair to some other port or purchase an article which is necessary while having a plentiful supply on board shipped for the purpose, and which he is debarred from using.

Charter-
parties

In the contracts of affreightment drawn up between charterers and shipowners a clause is often inserted which in its working is injurious to the interests of the owners; its direct result being the restriction it imposes on the action of the master by raising the fee or compensation payable by him as the owner's agent to the local ship-broker or ship-chandler. Mr. Pignatorre has had several cases submitted to his consideration during his residence at Messina. The clause to which he refers runs as follows:—"Vessel to be consigned to charterer's agent at port of discharge or loading, paying usual fee only, under a penalty of 5*l.*, or the captain to apply for business to Mr. _____," and is therefore, undoubtedly one limiting the master to the employment of the individual mentioned in the contract of affreightment,

under a penalty of 5*l.*, whereas were he at liberty to select his own agent on the spot, in all cases in which he should not be satisfied with the services of the person specified in the face of the charter party, he would often succeed in performing the necessary commercial operations at a cheaper rate or in a more satisfactory manner. Under the circumstances, Mr. Pignatorre thinks it would be more advisable generally to allow the captain a discretionary power or option in the matter.

Despite the uniformly prevailing distress and consequent discontent springing partly from the heavy taxation, partly from the unfavourable agricultural outlook, both in the grape and olive crops of last year, and which have been, according to many competent authorities, the two chief causes of the various riots and disturbances which have occurred elsewhere both on the mainland and in Sicily; he is glad to be able to state that public security has remained unaffected by these untoward occurrences within his Vice-Consular district, and as far as he is aware within the whole province of Messina. This fact has been recognised so fully by the Italian authorities that the stringent measures meted out to Sicily when the island was placed under martial law, as a whole, have only been formally applied to Messina, especially in those dispositions relating to the right of bearing arms; in almost every case, permission was granted to all applicants to retain their fire-arms.

The few arrests which have been enforced against some obscure individuals were not made to punish any act of violence or even to prevent any probable disturbance, but with a view of restraining any overt and public expression of opinions which are rightly considered dangerous.

It is to be regretted, that in view of the peaceable dispositions of the people and especially of the peasantry, of its magnificent situation and certainly unsurpassed climate, that Messina is not more resorted to as a winter residence, and that no steps hitherto have been taken in this direction by some enterprising capitalist, who by the erection of suitable hotels and villas would render the place more popular and cause its advantages to be better appreciated. As it is, the few health-seekers who venture there, finding deficient accommodation, pass through and continue their journey until they reach some place where their comforts can be better attended to, and their time more pleasantly occupied.

CATANIA.

Mr. Vice-Consul Elford reports as follows:—

The value of imports of all kinds for the year 1893 was 609,106*l.* and of the exports 1,081,124*l.* in comparison with 609,310*l.* and 907,129*l.* respectively for the preceding year.

The exports of this mineral show a slight increase over 1892, being for 1893 124,850 tons as against 119,996 tons, and the
(1754)

average price for the year was about 3*l.* 17*s.* 6*d.* per ton f.o.b., which does not pay the producer, and mines where the difficulty caused by the presence of water has to be contended with will necessarily have to be closed.

Shipping.

The total number of vessels which have entered the port of Catania during the year 1893 was 3,110 representing a tonnage of 869,215 tons, of which 193 (191 steamers and 2 sailers) representing a register tonnage of 214,518 tons were British property, of the foregoing only 88 presented their articles at this Consulate.

The Italo-Britannica Steamship Company, which was mentioned in the 1892 report as trading between this port and London under the Italian flag, has since come to grief, the boats having been seized by the mortgagee, and we have now only the General Steam Navigation Company as regular traders in that direction.

Agriculture.

The year 1893 was generally a bad one for Sicily, owing to the absence of rain at seed-time the wheat came up badly, and the weather was unfavourable in April and May to the growth, and the result was a very medium crop of bad quality.

Barley.

An average crop.

Beans.

Under an average crop.

Olives.

This crop was a failure, about 10 per cent. under a medium crop.

Almonds.

A good crop.

Linseed.

Good average crop.

Mustard-seed.

A large crop for which full prices were obtained.

Wine.

The production was about one quarter of the average and of bad keeping quality, owing to drought and the effects of the phylloxera which has destroyed nearly all the vines in the plain of Catania, and has now attacked the vines in the mountainous regions of Etna; but fortunately the vines there being on volcanic soil resist the attacks of the insects which are successfully checked with the aid of the sulphate of carbon cure, and so far only 5 per cent. of the entire area is attacked by the disease. The production of wine in the province of Catania for 1893 was about 24,200,000 gallons.

Cattle.

Prices of cattle ruled very low indeed, with great scarcity of fat cattle at the fairs, owing to the scarcity of pasturage caused by the drought.

Rainfall.

The rainfall for the year 1892-93 up to August 31 was only 23.06 inches, whereas in the year 1891-92 it was 28.16 inches and in 1890-91 it was 30.46 inches.

In Sicily a small rainfall always means a bad year for agriculture.

Population.

The population of Catania continues to increase, and according to the municipal returns for 1892 it was 102,000, whilst that of 1893 is 113,391.

Industry.

During 1893 a new industry has been started, and is giving good results, viz., the Insulaire Company, owned by an English firm, for making rectified sulphate of carbon used for curing the vines attacked by the phylloxera.

The process, with a few modifications, is the same as that of other countries, there are 16 retorts capable of producing 9,000 tons, working 10 months per annum, of this the bulk is used in this island and the mainland, and a growing export trade is also being established with Austria.

Three new refineries have been started during 1893 bringing the total number up to seven. Sulphur refineries.

The Circum-Etna narrow gauge railway, which has been 3 years under construction, and starting from Catania will go round the base of Mount Etna with a terminus at the roadstead of Riposto and touching at other importing towns, bring this vast populated district of Sicily in railway communication with this city and the principal railway, and the works of which have been suspended for some time, is now likely to be finished early in 1895 and one section will be opened in 1894. The road is completely finished, with the exception of the terminals at Catania and Riposto, it has a total length of 110 kiloms. and was recently inspected by special Government officials who highly praised the manner in which the works had been carried out by the English contractors, Messrs. Trehella and Co. Public works.

A further sum of 30,000*l.* is to be expended in 1894 on the Catania harbour, for the completion of the breakwater and quays, and this harbour which has been exempt from disaster for the last 25 years will then be very secure and present facilities for loading and discharging second to none in Sicily. Harbour.

This province has been disturbed and business somewhat paralysed during the past year owing to the appearance of several bands of brigands, but the principal components have lately been captured or shot, and the Government has taken such measures as will effectually stamp them out. Public safety.

SYRACUSE.

Mr. Vice-Consul Bisani reports as follows :—

That the wine trade which at one time used to be one of the principal resources of the province of Syracuse is now daily diminishing, and that a large quantity of wine is now being daily imported for local consumption from Marsala and the province of Trapani. Wine.

Of the 45,000 hectares of land mentioned in his report of 1890 as cultivated with vines, it is considered that about two-thirds have been destroyed by the phylloxera, and the remaining one-third, more or less attacked by the same insect, yielded a very poor quantity of must, which soon turns into vinegar or what is called “vino agro dolce.” Vines.

There has been a large increase in the exportation of oranges and lemons, prices ranged pretty fair last season, but about the end of it both producers and exporters in many cases suffered heavy losses, more so with lemons, which were all more or less infected by the so-called “pidocchio.” Exports of fruit.

Olive oil.

There was also an increase in the exportation of olive oil, the greater part of which being of a dark green colour is sent to Malta.

British shipping.

Of the 164 British merchant steamers which entered this port last year the greater part are Maltese engaged in carrying the Malta Government mails between that port and Syracuse and vice-versâ, now five times weekly.

GIRGENTI.

Mr. Vice-Consul Oates reports as follows :—

British shipping.

That the number of British ships (all steamers) that entered Port Empedocle during 1893 was 46 with a tonnage of 58,326 tons, of which 40 were in ballast, and arrived from Italian and Mediterranean ports, while 6 were coal laden from England.

The same number left, viz. :—

To—	Number of Vessels.		
	With Cargo.	In Ballast.	Total.
United Kingdom	10	..	..
United States	25	..	..
Russia	1	..	..
France	2	..	..
Portugal	1	..	..
Eastern ports	..	6	..
Total	40	6	46

Imports—
Coal.

The chief import was coal from Great Britain and amounted to 10,000 tons.

Exports—
Sulphur.

The exportation consisted solely of sulphur, amounting to nearly 153,000 tons, valued at about 460,000*l*. While in 1892 the quantity exported was 130,800 tons, valued at 608,000*l*. This will show the fall in the price of sulphur.

MARSALA.

Trade and
commerce.

Mr. Vice-Consul Gray reports as follows :—

Spirit.

Coal.

The returns of exports and imports show a falling-off from those of 1892, although the trade in wine has been fairly brisk during 1893. The importation of foreign spirit still continues to decrease, owing to the reduced tax on spirit made from wine, and the cheap price of wines that are fit for distilling only. The importation of coal has increased, which is partly to be accounted for by several steam mills having been started in opposition to the old fashioned windmills.

The return of vessels trading here does not differ much from Shipping that of 1892.

The vintage of 1893 gave every promise of being both plentiful and of first rate quality, but owing to the excessive heat and continuous dry scirocco winds during September, the grapes ripened so rapidly that they became, to a great extent, rotten before they could be gathered; very much the same as was experienced in 1892. Even up to the beginning of September the vintage was expected to be an unusually abundant one, and proprietors disposed of their produce beforehand at very low prices, but the price of mosto (must) rose considerably when it was found out how short the vintage was resulting. The vintage began and finished early, and the quantity resulted less than last year, whilst the quality was far from satisfactory in general, owing to the vintage being too early, whereas that vintaged late was good. There was no appearance of "peronospora" or "phylloxera" in these districts during the year. There was a good demand for the new wine, and prices have been kept up.

General
remarks.
Vintage.

RETURN of British Shipping at the Port of Palermo during the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.			Total Tonnage.			Total Value of Cargoes.
With Cargoes	In Ballast	Total	With Cargoes	In Ballast	Total	With Cargoes	In Ballast	Total	
54	...	54	59,910	...	59,910	92	...	92	...
									83,608
									2,038

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.					Cleared.				
Number of Vessels.			Tonnage.			Number of Vessels.			Value of Cargoes.
With Cargoes	In Ballast	Total	With Cargoes	In Ballast	Total	With Cargoes	In Ballast	Total	
Countries whence Arrived.						Countries to which Departed.			
Italy	220	...	246,161	...	246,161	62	...	62	£
Austria	5	...	7,858	...	7,858	66	...	66	...
Spain	1	...	2,072	...	2,072	21	...	21	...
France	1	...	2,408	...	2,408	6	...	6	...
United States	1	...	1,172	...	1,172	3	...	3	...
Portugal	1	...	1,055	...	1,055	2	...	2	...
Russia	1	...	1,033	...	1,033	1	...	1	...
Total	231	...	261,284	...	261,284	109	...	109	...
Great Britain and Colonies	54	...	59,910	...	59,910	92	...	92	...
Grand total	285	...	321,194	...	321,194	201	...	201	...
Increase	...	...	...	...	...	...	...	...	...
Increase	...	...	...	...	...	...	...	...	...

ITALY.

RETURN of all Shipping at the Port of Palermo during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	363	281	321,431	285	321,794
Italian	2,141	110,971	1,388	873,335	3,479	984,306
German	...	...	48	52,348	48	52,348
Dutch	...	...	28	22,078	28	22,078
Norwegian and Swedish	...	...	7	5,720	7	5,720
Belgian	...	...	32	32,970	32	32,970
Austrian	4	1,826	43	32,168	47	33,994
Greek	5	1,422	19	16,524	23	17,946
Other countries	4	509	1	428	5	937
Total	2,158	115,091	1,796	1,357,002	3,954	1,472,093
„ for the year preceding	2,217	124,580	1,713	1,316,834	3,930	1,441,364

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	363	281	321,431	285	321,794
Italian	2,084	100,609	1,320	840,514	3,404	941,123
German	...	...	46	50,113	46	50,113
Dutch	...	...	28	32,078	28	32,078
Norwegian and Swedish	...	...	7	5,720	7	5,720
Belgian	...	...	31	31,843	31	31,843
Austrian	4	1,826	40	29,116	44	30,942
Greek	5	1,422	18	16,524	23	17,946
Other countries	4	509	1	428	5	937
Total	2,101	104,729	1,772	1,327,767	3,873	1,432,496
„ for the year preceding	2,144	129,291	1,734	1,337,373	3,878	1,466,664

RETURN of Principal Articles of Export from Palermo during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Green and dry fruits	...	...	£ 600,267	...	£ 511,052
Sumach	Cwts. ...	762,950	333,265	754,545	333,366
Oils	Gallons ...	196,834	37,402	284,746	77,650
Cereals	Bushels ...	...	3,043	117,206	23,140
Manna	Cwts. ...	1,439	11,146	825	5,375
Tartar	„ ...	41,131	67,127	43,468	98,696
Animals and their produce	...	...	11,189	...	13,076
Lemon juice	Gallons ...	186,362	19,195	144,474	3,517
Wine... ..	„ ...	2,339,194	93,276	1,167,264	68,098
Other articles	...	...	40,400	...	24,550
Total	...	...	1,216,260	...	1,159,020

RETURN of Principal Articles of Import to Palermo during the
Years 1893-92.

Articles		1893		1892	
		Quantity.	Value.	Quantity	Value.
Cotton goods and yarns ...	Cwts.	5,166	57,459	7,965	74,630
Woolen ...	"	2,430	49,243	2,534	75,664
Spiken ...	"	243	20,640	282	43,143
Linen ...	"	6,322	5,292	12,273	16,170
Coals...	Tons	107,136	104,993	113,070	117,987
Cereals and vegetable produce ...	Bushels	1,896,289	326,969	534,769	147,987
Hides and skins ...	Cwts.	3,676	22,526	2,740	24,175
Animals and their produce ...	"		53,765		80,685
Petroleum ...	Gallons	1,062,798	32,850	767,988	23,788
Colours and dyes ...	Cwts.	42,638	23,548	10,767	7,840
Iron and metals ...	Tons	9,333	60,860	5,469	66,471
Machinery ...	"	270	20,068	513	28,566
Glassware ...	Cwts.	21,460	25,143	7,769	16,734
Timber and furniture ...	"	434,827	77,352	277,325	44,861
Colonials ...	"	24,667	68,486	7,460	46,674
Chemicals ...	"	16,786	10,952	16,653	9,761
Other articles ...	"		33,308		62,544
Total ...			1,013,033		882,087

TABLE showing Total Value of all Articles Exported from and
Imported to Palermo from and to Foreign Countries during
the Years 1893-92.

Country.	Exports.		Imports	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain ..	270,294	332,623	294,914	310,267
France ..	201,389	143,949	54,386	98,130
Germany ..	35,848	33,208	90,403	129,778
United States ..	550,412	499,591	114,794	61,411
Austria ..	36,981	68,344	96,047	64,697
Holland ..	7,446	36,968	16,158	27,749
Turkey ..	6,291	6,331	18,311	44,867
Russia ..	6,766	5,774	233,770	104,632
Belgium ..	4,968	1,091	21,681	14,013
Other countries ..	95,862	32,041	72,619	26,548
Total ..	1,216,260	1,159,020	1,013,033	882,087

RETURN of all Shipping at the Port of Messina during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	23	2,862	317	359,798	340	362,660
Italian	2,061	110,031	1,796	1,261,418	3,857	1,361,449
German	...	...	36	32,236	36	32,236
Austrian	2	845	166	122,196	168	123,041
Greek	16	3,980	14	11,560	30	15,540
Other countries ...	6	1,024	89	47,383	95	48,407
Total	2,108	118,732	2,418	1,824,591	4,526	1,943,323
„ for the year preceding	2,155	98,764	2,170	1,561,861	4,325	1,660,615

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	23	2,862	309	357,144	332	359,996
Italian	2,005	105,011	1,788	1,248,001	3,793	1,353,012
German	...	...	35	31,325	35	31,325
Austrian	2	845	165	121,290	167	122,135
Greek	12	3,004	14	11,560	26	14,564
Other countries ...	4	679	85	46,001	89	46,680
Total	2,046	112,391	2,396	1,816,321	4,442	1,927,712
„ for the year preceding	1,951	15,700	2,151	1,537,189	4,102	1,552,889

RETURN of Principal Articles of Export from Messina during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Wine... ..	Gallons ...	887,568	£	884,022	£
Olive oil	Cwts. ...	35,252	...	80,173	...
Essences	„ ...	5,861	...	5,042	...
Argol and wine-lees	„ ...	136,611	...	101,812	...
Lemon juice	„ ...	64,822	...	35,538	...
Oranges and lemons	„ ...	1,115,396	...	1,039,819	...
Almonds	„ ...	18,117	...	18,521	...
Walnuts and filberts	„ ...	40,047	...	92,384	...
Dried fruit	„ ...	3,332	...	112,042	...
Seeds... ..	„ ...	1,044	...	2,799	...
Other articles	„ ...	...	...	...	...
Total	...	...	...	...	1,887,564

RETURN of Principal Articles of Import to Messina during the
Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Mineral oil	Cwts.	42,734	£	33,571	£
Coffee	"	2,541	...	2,593	11,502
Sugar	"	1,196	...	370	12,410
Cotton goods	"	3,011	...	3,060	330
Woollen goods	"	990	...	1,020	31,069
Hides and skins	"	11,788	...	19,312	27,767
Iron	"	22,043	...	26,135	66,438
Pix-iron	"	12,498	...	21,108	10,146
Steel	"	740	...	598	6,244
Window glass	"	1,225	...	455	831
Coals	Tons	78,344	...	70,882	1,313
Wheat	Cwts.	604,418	...	55,562	74,612
Stock, codfish, and herrings	"	45,898	...	55,850	116,548
Other articles	"	...	...	...	68,098
Total	...	...	...	...	288,498
					715,106

RETURN of British Shipping at the Port of Catania in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.		Total Number of Vessels.		Total Tonnage.		Total Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	Total.
28	5	31	26,140	4,811	36,951	631	£	...	...
									£
									...

Indirect and Carrying Trade in British Vessels from and to other Countries.

Entered.										Cleared.											
Countries whence Arrived.			Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.	Countries to which Departed.			Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.
			With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.						With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
Italy	...	...	35	17	52	41,731	15,720	57,451	1,187	£	United States	...	...	3	1	4	3,585	1,414	4,999	94	£
Spain	...	...	1	1	2	1,838	972	2,810	41	...	Greece	...	...	1	1	2	991	897	1,888	41	...
Austria	...	...	1	1	2	1,444	...	1,444	25	...	Spain	...	...	3	...	3	2,409	...	2,409	48	...
Russia	...	...	1	...	1	961	...	961	20	...	Turkey	...	...	...	16	17	2,409	13,781	16,089	238	...
Roumania	...	...	1	...	1	991	...	991	21	...	Portugal	...	...	6	...	6	5,544	...	5,544	128	...
										...	Austria	...	...	4	...	4	2,166	...	2,166	60	...
										...	Russia	...	...	...	5	5	...	5,105	5,105	104	...
										...	Roumania	...	...	1	1	2	964	967	1,931	42	...
										...	Italy	...	...	39	4	43	49,575	3,628	53,203	1,065	...
Total	...	...	39	18	57	45,965	16,692	62,657	1,284	...	Total	...	...	59	27	86	67,232	25,792	93,024	1,910	...

RETURN of all Shipping at the Port of Catania during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	403	191	213,755	193	214,158
Italian	1,780	75,970	831	668,324	2,611	744,294
German	...	...	30	28,533	30	28,533
Greek	64	16,706	22	21,794	86	38,500
Other countries ...	15	2,222	175	118,159	190	120,381
Total	1,861	95,301	1,249	1,050,565	3,110	1,145,966
.. for the year preceding ...	1,919	91,176	1,191	779,039	3,110	869,215

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	403	194	219,994	196	220,397
Italian	1,760	79,990	819	649,195	2,569	729,175
German	...	...	27	24,141	27	24,141
Greek	66	17,368	21	16,789	87	34,657
Other countries ...	16	2,240	171	115,320	187	117,600
Total	1,834	100,531	1,232	1,025,439	3,066	1,125,970
.. for the year preceding ...	1,898	90,645	1,194	722,870	3,092	813,515

RETURN of Principal Articles of Export from Catania during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Wine, oil, and spirits	Gallons ...	3,618,950	£ 98,259	2,054,350	£ 44,418
Colonials, drugs, and tobacco ...	Tons ...	242	6,487	239	4,337
Argols, manna, liquorice root, and lemon juice	...	2,340	48,338	1,082	29,636
Wool	...	47	4,604	70	6,814
Hemp, flax, and jute	...	8	273	14	1,489
Staves, casks, and corkwood ...	...	326	6,632	189	4,691
Kid skins and gloves	...	19	2,663	13	1,808
Lava stone and asphalt	...	11,891	6,789	11	299
Cereals, green and dry fruits ...	...	35,835	466,696	39,436	422,496
Cheese, salt fish, &c.	...	811	3,439	968	7,524
Sulphur	...	124,860	424,663	119,996	346,529
Other articles	...	176	2,310	43,202	26,979
Total	...	...	1,081,124	...	907,129

RETURN of Principal Articles of Import to Catania during the
Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Petroleum	Tons ...	1,274	£ 8,023	1,458	£ 9,180
Colonials	" ...	224	18,649	180	9,622
Chemicals	" ...	980	10,374	1,225	14,267
Colours and dyes	" ...	1,128	2,629	1,471	14,829
Linen goods and yarns	" ...	25	2,570	190	5,021
Cotton "	" ...	169	30,821	269	43,466
Woollen goods and yarns	" ...	65	22,818	86	30,668
Silk "	" ...	1	2,741	1	3,540
Timber and furniture	" ...	12,662	31,295	17,900	40,132
Hides and skins	" ...	443	23,618	810	51,969
Iron and metals	" ...	184	12,627	1,975	24,833
Machinery	" ...	77	4,638	93	5,807
Glassware	" ...	4,605	6,072	7,264	12,779
Coals	" ...	49,551	36,705	70,835	60,572
Cereal and vegetable produce	" ...	46,942	365,838	31,065	240,286
Animals and their produce	" ...	147	6,777	209	20,680
Other articles	" ...	173	18,511	191	21,659
Total	...	...	609,106	...	609,310

TABLE showing Total Value of all Articles Exported from and
Imported to Catania from and to Foreign Countries during
the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	160,240	154,119	102,376	159,832
France	66,442	60,502	15,685	24,716
Germany	129,537	83,229	25,429	26,585
United States	111,917	114,511	20,427	19,806
Austria	221,609	214,846	64,733	78,757
Holland	87,169	31,293	4,739	4,883
Turkey	52,694	41,873	1,556	16,963
Russia	68,483	42,290	347,104	228,670
Greece	59,940	59,790	6,680	7,965
Other countries	123,143	104,676	20,377	41,133
Total	1,081,124	907,129	609,106	609,310

RETURN of Foreign and British Shipping at the Port of Syracuse during the Year 1893.

ENTERED.

Nationality.	With Cargoes.			In Ballast.			Total.			Value of Cargoes.
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	
British ..	3	8,052	72	161	50,259	2,550	164	58,321	2,622	£
Italian ..	57	113,880	7,300	180	37,420	1,000	717	151,300	8,290	7,500
American ..	14	7,463	264	12	6,282	255	26	13,745	620	87,400
Neapolitan ..	..	..	..	6	1,792	89	6	1,792	89	82,200
German ..	1	1,107	24	1	1,007	22	2	2,114	46	..
Greek ..	..	..	..	2	130	10	2	130	10	18,326
Turkish ..	..	..	..	2	170	13	2	170	13	..
Total ..	555	131,502	7,760	364	97,470	4,850	919	228,972	12,550	145,585

CLEARED.

Nationality.	With Cargoes.			In Ballast.			Total.			Value of Cargoes.
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	
British ..	10	8,856	223	152	44,530	2,311	162	53,386	2,534	£
Italian ..	683	13,926	7,395	..	..	..	683	13,926	7,395	15,150
American ..	25	13,476	602	..	..	..	25	13,476	602	128,000
German ..	1	1,067	22	1	1,107	24	2	2,114	46	26,365
Greek ..	..	..	..	2	130	10	2	130	10	2,612
Turkish ..	..	..	..	2	170	13	2	170	13	..
Total ..	719	177,265	8,242	157	46,637	2,858	876	223,902	10,600	178,255

TABLE showing the Total Exports from Syracuse during the Year 1893.

Articles.	Great Britain and Colonies.		Austria.		Russia.		Other Countries.		Total.	
	Quantity.	Value	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
Olive oil ..	Tons.	£	Tons.	£	Tons.	£	Tons.	£	Tons.	£
" husks. ..	624	23,088	..	..	..	..	708	26,196	1,332	49,284
Lemons ..	1,818	2,182	..	..	..	..	2,700	3,240	4,618	5,422
Peel. ..	1,000	4,375	4,000	17,500	800	1,312	1,720	7,524	7,020	30,711
Wine ..	1,450	2,430	..	..	..	..	430	725	1,880	3,155
Locust beans ..	400	3,200	780	6,240	..	..	1,600	12,800	2,780	22,240
Firewood ..	1,600	4,800	..	..	..	..	2,300	6,900	3,900	11,700
Salt ..	1,535	767	..	..	..	..	..	..	1,535	767
Cheese ..	2,900	1,450	..	..	2,600	1,300	3,000	1,500	8,500	4,250
Almonds ..	220	10,340	..	..	..	..	360	16,450	570	26,790
Hemp and seeds ..	25	1,650	45	2,325	..	..	36	2,289	106	6,764
Salt fish ..	165	990	..	..	..	..	806	4,886	971	5,826
Divers goods ..	140	310	..	..	..	..	215	537	355	847
..	..	..	..	..	..	..	1,370	5,480	1,370	5,480
Total ..	11,877	55,528	4,825	26,565	2,900	2,612	15,235	88,477	34,837	173,236

PALERMO.

TABLE showing the Total Value of Imports at Syracuse during the Year 1893.

Articles.	Great Britain and Colonies		Austria.		Russia.		Other Countries		Total.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
Coal.	Tons. 6,000	£ 7,500	Tons. ..	£ ..	Tons. ..	£ ..	Tons. ..	£ ..	Tons. 6,000	£ 7,500
Petroleum ..	..	..	..	..	.. 476	11,544	.. 640	15,528	1,116	27,072
Rice. ..	..	..	..	..	..	..	.. 183	1,830	183	1,830
Wheat. ..	..	..	..	..	2,200	18,326	1,697	13,628	3,837	31,054
Maize. ..	..	..	..	..	..	..	4,200	13,450	4,200	13,450
Salt fish ..	..	..	..	..	..	..	178	2,848	178	2,848
Colonials ..	..	..	..	..	..	..	186	3,389	229	5,655
Iron and steel	93	2,325	..	..	..	..	1,200	14,220	1,200	14,220
Wine ..	..	..	..	..	..	..	1,300	11,400	1,300	11,400
Dryers goods ..	..	..	..	..	..	..	69	2,760	69	2,760
Timber ..	..	..	2,379	19,032	983	7,864	..	..	3,362	26,896
Total ..	6,093	9,825	2,379	19,032	3,659	37,734	9,543	78,994	21,674	145,585

RETURN of British Shipping at the Port of Marsala in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.						Cleared.					
Total Number of Vessels.			Total Tonnage.			Total Number of Vessels.			Total Tonnage.		
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.
8	114	122	5,060	18,757	23,817	120	..	120	23,673	..	23,673
			Total Number of Crews.						Total Number of Crews.		
			1,169						1,155		
			£ 1,388						£ 72,168		

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.						Cleared.					
Number of Vessels.			Tonnage.			Number of Vessels.			Tonnage.		
Countries whence Arrived.			With Cargoes.	In Ballast.	Total.	Countries to which Departed.			With Cargoes.	In Ballast.	Total.
Tunis	..	..	3	3	124	Tunis	..	..	175	..	175
			124						175		
			19						23		
			£ ..						£ 1,275		

RETURN of all Shipping at the Port of Marsala during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	99	5,446	26	18,465	125	23,911
German	...	...	7	6,694	7	6,694
Danish	...	...	3	2,545	3	2,545
Italian	1,138	46,170	205	186,156	1,343	232,326
Tunisian	5	189	...	...	5	189
Total	1,302	51,815	241	127,970	1,543	179,785
for the year preceding ...	1,304	46,696	256	133,505	1,560	180,201

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	98	5,353	26	18,465	124	23,818
German	...	...	7	6,694	7	6,694
Danish	...	...	3	2,545	3	2,545
Italian	1,150	45,940	205	186,156	1,355	232,096
Tunisian	5	189	...	...	5	189
Total	1,356	51,962	241	127,871	1,597	179,833
for the year preceding ...	1,376	42,580	256	133,505	1,632	176,085

RETURN of Principal Articles of Export from Marsala during the Years 1893-1902.

Articles.			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
Wine	Pipes ...	...	73,719	...	...	...
do. lees, dried ...	Tons ...	...	110	4,411	538	21,535
Green fruit	Cwts. ...	...	60	25	166	58
Dried "	Tons ...	...	73	50	...	...
Beans	Cwts. ...	...	...	...	14	174
Cheese	"	...	600	2,647	100	34
Olive oil	"	...	2,404	5,288	22	75
Ses. salt	Tons ...	...	...	...	50	110
Other articles	"	...	...	42	300	148
Total	...	...	...	156,145	...	628,941

RETURN of Principal Articles of Import to Marsala during the
Years 1893-92.

Article		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Coffee and sugar ..	Cwts ..	150	611	162	670
Coal	Tons ..	2,192	2,280	1,018	1,059
Bran	Cwts. ..	24	6	217	57
Staves	Number	550,000	10,379	600,000	10,800
Cattle	Head ..	124	360	124	361
Iron	Tons ..	120	902	96	772
Grain	Quarters	..	..	848	1,988
Petroleum	Tons ..	457	3,109	411	2,799
Spirit	Pipes ..	279	2,790	310	3,100
Wood for building purposes	Tons ..	..	..	146	366
Cloth	Cwts. ..	84	569	35	494
Other articles ..	..	..	130	..	10,671
Total	..	..	21,133	..	33,137

TABLE showing Total Value of all Articles Exported from and
Imported to Marsala to and from Foreign Countries during the
Years 1893-92.

Nationality.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
America	15,800	1,182	10,489	12,160
Great Britain and Colonies	147,315	185,424	4,312	9,369
Italy	201,230	243,402	..	..
France	14,160	28,395	1,304	1,456
Germany and Russia ..	48,870	23,046	4,746	3,230
Tunis and other foreign countries	28,770	77,492	285	6,922
Total	456,145	658,941	21,136	33,137

RETURN of all Shipping at the Port of Trapani during the Year
1893.

ENTRED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	18	3,203	13	13,763	31	16,966
Danish	32	14,839	16	11,291	48	26,070
Norwegian	1	3,669	66	36,667	76	40,336
Swedish	2	938	2	1,422	4	2,360
Greek	6	1,045	10	8,670	16	9,715
Austrian	3	1,648	1	734	4	2,382
German	1	1,188	1	813	2	2,001
Danish	...	...	1	1,000	1	1,000
American	1	1,329	...	...	1	1,329
Russian	2	927	...	...	2	927
Spanish	1	228	...	...	1	228
Total	76	29,014	110	78,730	186	107,743
.. for the year preceding	...	...	...	...	215	121,790

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	18	3,203	13	13,763	31	16,966
Danish	32	14,839	16	11,291	48	26,070
Norwegian	10	3,669	66	36,667	76	40,336
Swedish	2	938	2	1,422	4	2,360
Greek	6	1,045	10	8,670	16	9,715
Austrian	3	1,648	1	734	4	2,382
German	1	1,188	1	813	2	2,001
Danish	...	...	1	1,000	1	1,000
American	1	1,329	...	...	1	1,329
Russian	2	927	...	...	2	927
Spanish	1	228	...	...	1	228
Total	76	29,014	110	78,730	186	107,743
.. for the year preceding	...	...	...	...	215	121,790

(1754)

RETURN of British and Foreign Shipping at the Port of Trapani during the Year 1893.

ENTERED.

Nationality.	With Cargoes.			In Ballast.			Total.			Value of Cargoes.
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	
British ..	11	11,777	228	20	5,189	169	31	16,966	397	£ 82,010
Italian ..	24	13,195	..	24	12,875	..	48	26,070	..	96,140
Norwegian ..	5	3,681	..	71	36,735	..	76	40,866	..	23,560
Swedish ..	2	1,133	..	2	1,227	..	4	2,360	..	1,885
Greek ..	11	7,776	..	5	1,339	..	16	9,115	..	93,230
Austrian ..	1	734	..	3	1,643	..	4	2,382	..	5,000
German ..	1	813	..	1	1,188	..	2	2,001	..	4,880
Danish ..	1	1,009	..	..	..	..	1	1,009	..	1,600
American ..	..	..	..	1	1,829	..	1	1,829	..	..
Russian ..	1	499	..	1	428	..	2	927	..	750
Spanish ..	..	..	..	1	228	..	1	228	..	..
Total ..	57	40,567	228	129	62,186	169	186	102,753	397	302,105

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RETURN of Principal Articles of Export from Trapani during the
Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Marine salt	Tons ...	102,783	34,415	141,521	51,301
Wine... ..	Gallons ...	96,000	14,400	90,300	13,650
Wood	Tons ...	75	150	...	...
Empty casks	"	330	66	8,487	1,690
Stones for building	"	380	760	465	910
Macaroni	"	25	400	29	464
Flour	"	11	165	...	...
Seeds... ..	"	...	...	2	36
Salted sardines	"	198	5,940	181	5,430
Cheese	"	11	836	18	1,368
Sparto ropes	"	152	4,256	127	3,656
Beans	"	320	2,560	618	4,888
Other articles	"	3,560	3,725	5,322	6,976
Total	...	...	67,673	...	90,268

RETURN of Principal Articles of Import to Trapani during the
Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Other articles	Tons ...	6,320	41,570	4,040	21,761
Coal	"	16,124	16,124	18,549	15,549
Wheat	"	45,273	362,184	26,539	210,712
Olive oil	"	2	72	...	...
Alcohol	"	22	528	93	2,352
Petroleum	"	341	3,580	323	3,392
Iron, plates, bars, hoops, &c.	"	39	312	326	2,760
Zinc plates	"	1	22	2	44
Tiles	"	85	170	285	570
Cotton cloths	Kilos. ...	800	122	648	100
Woolen cloths	"	1,190	156	1,554	204
Sparto weed	Tons ...	620	8,680	419	5,820
Cattle	Number ...	630	10,080	123	2,460
Horses, mules, and donkeys	"	430	2,150	34	170
Salted fish	Tons ...	470	1,410	231	693
Sponges	Kilos. ...	1,320	739	1,699	26
Empty casks	Number ...	392	68	1,699	297
Coffee	Tons ...	12	1,452	13	1,573
Seeds... ..	"	244	5,124	270	5,670
Planks	"	1,360	27,200	487	9,740
Total	...	...	481,743	...	293,873

TABLE showing Total Value of all Articles Exported from and Imported to Trapani from and to Foreign Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
England	2,381	12,249	16,598	18,448
Turkey	10,412	8,124	383,220	222,921
Tunis	4,561	8,864	12,230	2,927
United States of America	4,525	19,256	38,800	2,000
Sweden and Norway ..	22,879	24,414	7,500	5,000
Russia	1,452	3,006	..	1,392
Austria	2,404	2,500	19,700	4,740
Brazil	..	..	1,452	1,573
Germany	8,579	3,000	528	2,352
France	2,728	880	516	774
Other countries ..	7,752	7,975	6,199	31,751
Total	67,673	90,268	481,743	293,873

RETURN of British Shipping at the Port of Milazzo for the Year 1893.
Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.						Cleared.					
Total Number of Vessels.			Total Tonnage.			Total Number of Vessels.			Total Tonnage.		
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.
1	..	1	1,059	..	1,059	1	...	1	1,169	...	1,169
			Total Number of Crews.						Total Number of Crews.		
			22						23		
			£ ...						£ ...		

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.										Cleared.															
Countries whence Arrived.			Number of Vessels.				Tonnage.			Countries to which Departed.			Number of Vessels.				Tonnage.			Number of Crews.			Value of Cargoes.		
			With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.				In Ballast.	Total.	With Cargoes.	In Ballast.	Total.								
Italy	...	...	19	1	20	19,769	86	19,845	...	...	...	16	...	16	15,910	...	3,337	15,910	...	...	...	249	...		
Tunis	...	...	1	...	1	700	...	700	...	...	...	...	...	...	...	...	1,102	1,102	...	...	...	64	...		
																	...	...	...	...	...	22	...		
																	...	...	...	...	...	6	...		

RETURN of British and Foreign Shipping at the Port of Milazzo during the Year 1893.

ENTERED.

Nationality.	With Cargo.			In Ballast.			Total.			Invoice Value of Cargo.
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	
British ..	21	21,518	456	1	86	6	22	21,604	462	£
Greek ..	2	1,120	27	..	..	..	2	1,120	27	..
Norwegian ..	1	913	19	..	..	..	1	913	19	..
Swedish ..	1	700	19	..	..	..	1	700	19	..
Austro-Hungarian ..	7	4,886	119	..	..	..	7	4,886	119	..
Dutch ..	3	2,483	57	..	..	..	3	2,483	57	..
Italian ..	753	147,900	6,400	428	70,256	3,048	1,181	217,256	9,448	..

CLEARED.

Nationality.	With Cargo.			In Ballast.			Total.			Invoice Value of Cargo.
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	
British ..	17	17,079	372	5	4,325	90	22	21,604	462	£
Greek ..	..	..	..	3	1,615	37	3	1,615	37	..
Norwegian ..	..	..	..	1	913	19	1	913	19	..
Swedish ..	..	..	..	1	700	19	1	700	19	..
Austro-Hungarian ..	6	4,300	100	1	586	19	7	4,886	119	..
Dutch ..	3	2,483	57	..	..	..	3	2,483	57	..
Italian ..	410	73,119	3,250	787	144,837	6,208	1,197	217,656	9,548	..

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1894.
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AND FINANCE.

ITALY.

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ON THE
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REFERENCE TO PREVIOUS REPORTS, Annual Series Nos. 1244 and 1309.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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ITALY.

NAPLES.

Consul Hartwell to the Earl of Kimberley.

My Lord,

Naples, May 4, 1894.

I HAVE the honour to transmit herewith to your Lordship my Report on the Trade and Commerce of this Consular District for the year 1893, together with the reports for the same year received by me from Mr. Vice-Consul Berner on the Trade and Commerce of Bari, from Mr. Vice-Consul Briglia on the Trade and Commerce of Gioja Tauro, from Mr. Vice-Consul Cafarelli on the Trade and Commerce of Manfredonia, from Mr. Vice-Consul Pepe on the Trade and Commerce of Monopoli, and Statistics of Shipping and of Exports and Imports forwarded to me by Mr. Vice-Consul Drinkwater at Castellamare.

A supplementary Report embodying the official statistical information of all articles exported from and imported to Naples and outports, I shall have the honour to transmit as soon as published.

I have, &c.

(Signed) E. H. B. HARTWELL.

Report on the Trade and Commerce of the Consular District of South Italy for the Year 1893.

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*Public Works.***Naples
waterworks.**

The supply of pure water conveyed to Naples by the Naples Waterworks Company has been of such immense benefit to the sanitation of the city that the manner in which this supply is obtained may be worth recording. Since the opening of the works, not only the need of Naples has been regularly and abundantly provided, but the supply has been copious enough to furnish many of the adjoining communes and islands in the Gulf of Naples with good water when such were afflicted with epidemic diseases arising from an insufficient and generally impure supply of drinking water.

The supply comes from the springs of Urciuoli, in the Valley of Serino, about 30 miles nearly due east of Naples, and 1,080 feet above the level of the sea. It was originally proposed to utilise also the springs of Acquaro, situated in the same valley, about 140 feet higher up, but on the first-mentioned springs being enclosed it was found that in the driest season they furnished the amount stipulated for in the contract with the municipality, viz., a minimum of 37,000,000 gallons (17,000 cubic metres) a day. The passage of water through the aqueduct is accordingly limited to 440 gallons (2 cubic metres) a second.

The consumption of Naples is calculated at 44 gallons a day per head (in comparison, it may be noted, that the average consumption per head in London was given by the Royal Commission at 31 gallons per head), which, with a population of 500,000 only amounts to 22,000,000 gallons; consequently at present 16,000,000 gallons of water run to waste. In case, however, of still more water being required the springs of Acquaro and Pelosi still remain untouched, and could be brought into requisition.

The geological formation of the ground at the springs consists of an impermeable stratum at a depth of 40 feet; aqueous stratum 10 feet to 12 feet thick, composed of sand, shingle, and calcareous rock, covered and protected by a constant crust of black volcanic sandstone, and above this vegetable earth and gravel.

The subterranean waters are derived from distant parts of the mountainous region by which the valley is surrounded.

Two mountain torrents which traverse the tract of land above described have been floored and walled with concrete to prevent their currents from mingling with the springs.

An area of 35,000 square yards to 40,000 square yards of the aqueous sand has been drained by means of three collecting channels, about 6 feet high and 5 feet wide, which have a total length of 563 yards.

They are generally placed either in the tufa, or at the top of the aqueous stratum. The bottoms of the conduits are made porous, and a considerable space outside the walls of each channel is packed with broken limestone. Over the whole are two layers of beaten clay, with a layer of cement between each, so that the surface water cannot penetrate the system. Above this, earth is filled in to the general level of the area. The water that flows into and through these channels is very pure, and of the average temperature of 12° Centigrade.

The conveyance of this large quantity of water to Naples is effected by means of a modification of the plan made by the English engineer, Bateman, put forward in 1873 by Messrs. Charles Manby and Roberts, and is thus:—

A covered masonry canal, lined throughout with Grenoble cement, laid generally at a depth of 3 feet below the surface of the ground, but sometimes through tunnels under the hills, doubly placed along aqueducts raised 66 feet over valleys, and once changing into four parallel iron tubes, 2½ feet wide, which descend into the Valley of Cronti and rise on the opposite side, having at the lowest point to resist a pressure of seven atmospheres, conveys the water for a distance of 37 miles into two covered reservoirs on the hill of Cancellò, about 12½ miles distant from Naples.

The reservoirs are at the respective elevations of 68 feet and 444 feet.

The power of the fall of water from Cancellò into the plain is calculated at 2,900 horse-power, and might be easily utilised for the production of electricity.

From these reservoirs three iron syphons proceed down into the plain and up into the hill of "Capodimonte," which dominates Naples.

The longest of the three syphons measures more than 14 miles from end to end. It debouches into the high-service reservoirs 600 feet above the level of the sea.

These reservoirs may be reckoned among the grandest works of modern times. They are entirely hewn out of the rock. The low-service one holds 240,000 cubic feet of water in five large tunnels, which are filled to a depth of 27 feet. This reservoir lies 150 feet below the surface of the ground, so that the water is always cool.

From these "Capodimonte" reservoirs the main-service pipes branch all over the city, forming a network with close meshes. The supply is continuous, and there are no domestic cisterns.

From this description it will be seen that the water is collected underground in pure mountainous strata at a high elevation. All the reservoirs are subterranean, and the water is, therefore, never exposed to the open air until it issues from the taps or fountains

in Naples. Reservoirs and aqueducts are alike thickly lined with Grenoble cement, rendering pollution impossible. That this is the fact is proved by the researches of Messrs. "Punzo and Tursi" (*Ricerche chimiche e batteriologiche eseguite sopra l'acqua di Serino, durante l'anno 1889*) who say "the very rare organisms found are not capable of producing disease, and only some of them melt gelatine."

Perhaps still more striking is the fact that in the Bacteriological Department of the Zoological Station at Naples the "Serino" water is habitually used in researches as being bacteriologically more pure than the distilled water of the laboratories.

The length of the whole system of pipes that feed the city from the reservoirs of "Capodimonte" was at the opening of the works 62 miles. Numerous public fountains stand in all the 12 quarters of the city, and flow constantly. Several projects are afloat for supplying most of the adjoining "communes" with the superabundant Serino water.

The Naples drainage scheme is a most important factor in the sanitation of the city. The general outline of the works approved of, and now in progress, is as follows:—

The town has been divided into three zones, a high, a middle, and a low one, the latter running along the sea-shore. The sewage and pluvial waters of the high zone will run off by the natural decline; those of the middle and low zones meet at a certain point, and are to be raised by pumping machinery (high level process) in order to be united with those of the high zone into a common sewer.

Thus the main drainage is composed of:—

1. A collector discharging into an outlet in the Bay of Cumæ; the collector and outlet being of a combined system, viz., the sewage and rain-water flowing together.
2. A collector for the middle zone which opens into an outlet terminating in the Bay of "Nisida," and which is of a separate system, the whole sewer ending at "Piedigrotta," at which place the sewage will be raised by pumps into the outlet of "Cumæ," while the rain-waters will go to "Nisida."
3. Of two collectors for the low zone, the sewage thereof being pumped up to the superior collector, while the pluvial water flows to the sea.
4. Of two collectors for the water from the hills, carrying sand and earth; these will be discharged at the limits of the town of "Naples."
5. Of five safety outlets in case of torrents caused by extraordinary rainfall. In order to ensure the action of the sewers, a high-pressure conduit from the springs of "Serino" capable of giving 100,000 cubic metres of water per day, has been added to two existing old water conduits, the surplus water being destined to water the streets.

The works cited above are in an advanced state, and will be finished within a year. After which the street drainage will be taken in hand; to be led into the collectors of the different zones

The Naples
drainage
scheme.

Outline of
the main
drainage.

Present
condition of
the works.

and as each zone is independent of each other, the work can be proceeded with at various points at once.

Respecting the utilization of the sewage of Naples, it was considered that the city being built on the sea-shore, it would not be convenient to use the sewage for agricultural purposes, and the plan was therefore adopted to let the sewage run along the shore of "Cumæ," which is quite deserted, for about 20 kilometres. It is left to private enterprise to make use of the sewage for agricultural services, and pumps would bring it out of the town. Moreover, the irrigation system adopted in other countries has not been considered safe for adoption in this hot climate.

Utilization of
sewage.

The total cost of the drainage system is estimated at 920,000*l.* sterling, and will be defrayed by the State, though a portion will be refunded by the municipality of Naples by the payment of an annual interest.

Cost of the
whole project.

The project for the works commenced in 1875 and terminated in 1884, but their execution only began in 1885 by special vote of Parliament, and consequent on the fearful cholera epidemic of 1884. 4,000,000*l.* sterling having been voted as a subvention for the sanitation of Naples, and securities to that amount paying 5 per cent. interest redeemable in 60 years were then created, half of the interest going to the charge of the city of Naples. The balance of 4,000,000*l.* sterling (920,000*l.* sterling only having been required for the drainage system) will be employed for the demolition of the low quarters of the town.

The Sailors' Rest at Naples.

This institution was founded in 1883, under the Consulship of H. Grant, Esq., and after passing through various vicissitudes and changes, is fast becoming a complete success. Its object is to provide for the wants of seamen of all nationalities, and otherwise for strangers, who, not being in a position to afford ordinary hotel or boarding-house accommodation, can be provided with a comfortable home conducted on Christian and temperance principles. Good sleeping accommodation and meals are provided for seamen at 3 lire per diem, whilst for other visitors (being British subjects) a lesser charge is made if the "relief fund" is not able to pay the whole amount. The comforts of the rest are further promoted by a well-supplied reading and writing room, which contains a piano. The institution is under the charge of Mr. and Mrs. Burrowes, the former an old man-of-war's man, who thoroughly understands sailors, and who watches over the general condition of the port and surroundings in the interests of the morality and welfare of the sailors, whilst Mrs. Burrowes is singularly adapted to the work appointed her; a refinement of character and manner, together with her unflinching kindness and Christian love for all those coming under her matronly care, not failing to produce such results as are now fully apparent, and deemed by me worthy of report.

From the Naples Rest ships are visited in the interests, moral
(1767)

and social, of the officers and seamen, for the distribution of bibles and tracts, and in order to invite those who may desire to do so, to attend the religious services of the Rest.

The different ports in the neighbourhood, such as Pozzuoli, Castellamare, Torre del Greco, Torre Annunziata, and Salerno are visited by the superintendent and his helpers by means of the Mission boat "Hope," and the general work of the Rest is promoted according to the exigencies of each port, and the means at the disposal of the Mission.

It is especially noticeable that the general behaviour of British seamen, both on board their ships and on shore, has greatly improved of late years, this being strikingly evidenced at this port, and this I attribute, in a great measure, to the good influences of this and other "sailors' rests."

In this consular district, visited by so considerable a number of ships yearly, cases of misconduct of seamen have very rarely been brought to my notice, especially of late years, and consequently there have been but few fines, and very rare instances of imprisonment.

The "Sailors' Rest" at Naples is of immense advantage to the working of this consulate, and I would especially point out, for the information of the "Board of Trade," the great benefits which sailors derive from being sent to this institution, to be lodged and cared for, socially and morally, during their detention at this port.

The "Sailors' Rest" is affiliated with the "Seamen's Temperance League" (founded in 1883), and has been the means of obtaining many adherents to the latter.

The Italian authorities, on being appealed to by me, to prevent the smuggling of liquors on board the ships, and to check the embarkation of loose women for the purpose of visiting the seamen, have cheerfully given their aid, so that these evils may be said to have ceased to exist.

In 1885 a "Sailors' Rest Aid Society" was instituted in aid of the funds required for the successful working of this and other Rests, subscriptions being given by many British residents, and some others, including Italians in business. The total income derived from all quarters does not, however, exceed 200*l.* per annum; 100*l.* more at least being required to support the "Rest" at Naples, and carry out and extend the work done by the "colporteurs" at the various ports of this consular district and in Sicily. Funds are, therefore, earnestly hoped for to carry on and extend this useful institution.

Naples Anti-cruelty to Animals Society.

Naples Anti-cruelty to Animals Society.

This society, founded early in the year 1889, at the instigation of the "Princess Mele Barese" (née Mackworth Praed) continues to make good progress.

From subscriptions amounting to 94*l.* in 1889-90, 241*l.* in 1890-91, 432*l.* in 1891-92; the amount reached the handsome figure of 500*l.* in 1892-93; there is a slight decrease in the present

subscriptions, but, as many friends have lately joined the society, it is hoped that there will be no necessity for restricting its operations. The number of inspectors employed at present amounts to 15. I am glad now to note that the inspectors remonstrances as to overloading are attended to by the carters without its being necessary to call for the intervention of the police. Those in charge of the carts either diminishing their loads or employing additional animals for up-hill work. This inspection has also been extended to "Portici" (almost a part of this city), where the ill-treatment of animals was especially noticeable, as also at the island of Capri, where, particularly at Easter time, the horrible barbarities practised towards little birds have been, in a measure, prevented.

Books in the Italian language, enjoining pity and tenderness towards animals have been printed and distributed amongst the children at the municipal schools, and it is hoped that this course will be attended with good results. It is gratifying to notice that the Neapolitans themselves take an interest in the working of the society, and that several have applied to the honorary secretary for help in further preventing the ill-usage of animals. When public opinion once exhibits itself in the cause we shall soon see further improvements.

Shipping and Navigation.

The total number of vessels of all nations that entered the port of Naples during the year 1893 was 6,202, measuring 2,671,463 tons. The number of British vessels that entered the port of Naples during the year 1893 was 431, measuring (net registered tonnage) 721,311 tons, showing a decrease as compared with the previous year of 43 vessels and 23,107 tons.

The following are the lines of British steamers visiting the port of Naples:—

The Anchor Line.—Glasgow and Naples, thence to New York, about four sailings a month.

The British and Burmese Line.—Glasgow, Liverpool, and Rangoon and back to the United Kingdom, calling at Naples whenever passengers wanting to land or embark at this port offer; sailings about every three weeks outward and homeward.

The British India Line.—London, Naples, "Port Said," Aden, Colombo, Madras and Calcutta fortnightly each way; London, Naples, Port Said, Aden, Batavia and Queensland ports, four-weekly each way.

The Cunard Line.—Liverpool, Naples, Adriatic and Grecian ports, fortnightly.

The General Steam Navigation Company's Line.—London, Naples and Italian ports, fortnightly.

The Glynn Line.—Liverpool, Naples and Italian ports, fortnightly.

The McCracken Fenwick Company's Line.—London, Naples and Italian ports, fortnightly.

Total
shipping.
British
vessels.
Lines of
British
steamers.

F. Leyland and Company's Line.—Liverpool, Naples and Adriatic ports, fortnightly.

The Peninsular and Oriental Steam Navigation Company's steamers call outward bound for Calcutta fortnightly at Naples. The Company maintains a fortnightly line between Naples and Alexandria, and Naples and Genoa.

The Orient Line.—London, Plymouth, Gibraltar, Naples, Port Said, Colombo, Adelaide, Melbourne and Sydney, and vice versâ, fortnightly, landing and embarking mails to and from Australia at Naples.

The Wilson Line.—Hull, Naples and Italian ports, fortnightly.

Annex A.—RETURN of all Shipping at the Port of Naples during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	5	546	426	729,796	431	731,314
Italian	3,648	170,920	1,576	1,174,774	5,224	1,846,694
French	...	...	98	117,894	98	117,894
German	...	...	166	589,245	166	589,245
Norwegian	2	253	37	16,348	39	16,601
Danish	...	...	11	3,165	11	3,165
Other nations	12	3,462	221	171,181	233	174,643
Total	3,667	175,151	2,835	2,466,912	6,502	2,642,163
.. for the year preceding	3,107	158,275	2,248	2,166,995	5,355	2,325,270

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	8	729	425	729,572	433	730,301
Italian	3,624	166,563	1,567	1,166,822	5,191	1,833,385
French	...	...	97	116,399	97	116,399
German	...	...	163	577,825	163	577,825
Norwegian	2	253	34	16,666	36	16,919
Danish	...	...	13	16,484	13	16,484
Other nations	13	3,938	224	171,861	237	175,799
Total	3,647	171,423	2,824	2,476,489	6,471	2,647,912
.. for the year preceding	3,115	163,266	2,224	2,172,792	5,339	2,336,058

Imports of
codfish and
stockfish.

As compared with the last report, the following quantities of codfish and stockfish were imported into Naples during the year from September, 1893, to February, 1894 :—

Description.	Quantity.	
	1893-94.	1892-93.
	Quintals.	Quintals.
Norwegian	32,766	40,900
Shore fish	600	12,300
Labrador	14,558	19,500
Gaspe	13,383	12,627
French fish.. .. .	21,642	23,000
Total	82,949	108,327

21,460 quintals Norwegian stockfish were imported into this market, against 24,500 quintals of the previous years; the quantity is, as usual, very large, the price being much lower than the English fish, which was not obtainable under 19s. per quintal to 17. 1s. per quintal, while the former could be sold from 17s. per quintal to 18s. per quintal. There is a slight decrease in the importation of French fish, for this quality and for the Labrador (English); the demand has been particularly limited owing to the prevalence of influenza. Norwegian stockfish.

The season has been a most unsatisfactory one, and the losses both to shippers and receivers have been considerable.

Tartaric materials form one of the chief items of export from the southern provinces of Italy; the season commences in October, and statistical reports for the year are generally given from that month to September of the following year. Tartaric materials.

1891-92 total export amounted to 9,814 tons, valued at 425,240*l.*, while during the last season 1892-93, 9,881 tons, valued at 337,275*l.*, were shipped; the great difference in value arises from the depreciation this article has undergone in consequence of the large stocks accumulated through the excellent grape harvests of the last 2 years:—

Description.	1892-93.		1891-92.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Half refined tartar ..	1,317	72,435	1,512	98,280
Vinaccia argols.. ..	2,959	133,155	3,124	181,100
Crude argols	2,801	98,035	2,430	104,640

More than one-half of these products, especially of “argols” are shipped to the United States, the remainder is taken by Great Britain, France, Germany, and Austria in about equal shares.

Description.	1892-93.		1891-92.	
	Quantity	Value.	Quantity	Value.
Wine lees	Tons 2,804	£ 33,650	Tons 2,748	£ 41,320

Nearly all to Germany and Austria-Hungary.

Engineering Establishments.

Sir W. G.
Armstrong
Mitchell
and Co.,
Limited.
Possuoli.

These works have, under contract with the Italian Government, delivered nearly 4,000 tons of war material, almost exclusively guns and gun carriages. The former have been of the following calibres, viz.:—Nordenfelts, 4·6 inch, and 17 feet 7-inch gun.

The manufacture and shipment on board of four 68-ton guns with their platforms and hydraulic machinery for the "Re Umberto" has been finished this year, together with secondary armament; the ironclads "Sicilia" and "Sardegna" having also been armed in the last 4 years each with 68-ton guns (15 feet 7 inches).

The steel and other material used in the factory is now exclusively of Italian manufacture. The firm employ about 800 workmen all without exception being Italian; of the employés three-quarters are Italian.

The rates of wages vary from 5 c. to 15 c. ($\frac{1}{2}$ d. to $1\frac{1}{2}$ d.) an hour for boys, from $22\frac{1}{2}$ c. to 65 c. ($2\frac{1}{2}$ d. to 6d.) per hour for men. The total fortnightly wages amount to 42,000 lire (at par exchange 1,680*l.*).

Messrs.
Hawthorn-
Guppy.

During the past year Messrs. Hawthorn-Guppy completed the trials and consigned to the Italian Government the machinery of the cruisers "Lombardia" and "Calatafimi." The contract power was respectively 6,500 horse-power and 4,000 horse-power, but in both cases the horse-power was exceeded especially in the case of the "Lombardia."

The machinery of the cruiser "Elba" has also been completed, and has been mounted on board being now ready for the steam trials.

The machinery for the cruiser "Calabria" is almost completed and will shortly be consigned to the Italian Government.

These engines are of the twin screw vertical type, with ordinary marine circular boilers to develop a collective power of 4,000 horse-power.

For the Florio-Rubattino Company's steamer "Scilla," new engines and boilers have been made with a most satisfactory result, and for the sister vessel "Cariddi" the same work is now in progress.

Messrs. Hawthorn-Guppy are now engaged with the trials

of the ironclad "Sardegna," the preliminary trials up to the present time having been of a most satisfactory nature.

Contracts are in hand, and work in progress, for two sets of marine engines and boilers of 13,000 horse-power each, and one set of 13,000 horse-power, in both cases the machinery is of the twin screw vertical type with circular marine type boilers.

Population of Naples.

The total population, as returned by the municipal authorities, during the year 1892 was 532,527, to which 933 (being the excess of births over deaths during 1893) may be added, making the total for the year 1893, 533,460.

The births were 17,296, and the deaths 16,363, exclusive of Births and 1,003 strangers, as will be gathered from annexed table. deaths.

The average death-rate per 1,000 residents is officially stated Death rate. at 28·8 in the year 1893, against 25·7 in the previous year. This increase is mainly due (as will be seen by annexed list giving the causes of deaths) by a large increase of fatal cases owing to diseases of the nervous system, breathing apparatus, and cholera.

THE subjoined Statement, compiled from the Municipal Returns, shows the Number of Births, Marriages, and Deaths in the City of Naples during the Year 1893.

Months.	Births.				Marriages.	Deaths.			
	Alive.		Still-born.			Residents.		Strangers.	
	Male.	Female.	Total.	Male.		Female.	Total.	Male.	Female.
January ...	919	895	1,814	79	223	865	923	51	24
February ...	816	822	1,638	44	284	722	756	43	16
March ...	841	859	1,701	62	254	744	779	46	31
April ...	768	715	1,483	36	273	788	792	69	31
May ...	762	687	1,449	69	347	716	759	80	86
June ...	662	684	1,346	51	311	791	668	65	34
July ...	703	642	1,345	44	378	738	745	56	36
August ...	654	643	1,297	49	290	710	672	54	38
September ...	667	643	1,310	47	391	519	597	59	30
October ...	658	654	1,312	59	333	495	453	52	29
November ...	686	724	1,410	61	361	567	489	53	46
December ...	654	681	1,335	64	353	627	586	47	35
Total	8,790	8,586	17,376	655	3,654	8,273	8,000	657	396
Total	1,212				16,363				1,644

Causes of Death.	Number of Deaths.	
	1893.	1892.
Diseases of the fœtus and congenital malformation..	234	246
Small-pox	9	56
Measles	107	39
Scarlet fever	16	24
Erysipelas	25	30
Typhoid fever	164	88
Diphtheria and diphtheric croup	98	164
Whooping cough	42	6
Malaria fever	27	28
Dysentery.. .. .	33	57
Syphilis	169	118
Septæmia pyæmia (blood poisoning).. .. .	90	51
General tuberculosis	169	186
" scrofula	45	55
Anæmia	56	79
Marasmus (senile wasting)	742	676
Diabetes mellitus	29	23
Malignant tumours	460	363
Diseases of the nervous system	2,965	2,314
" breathing apparatus	5,666	5,139
" circulatory	1,389	1,486
" digestive	2,074	2,072
" reproductive and urinary systems	441	420
Diseases of pregnancy, child-birth, and puerperal	48	58
" the skin and subcutaneous tissue	257	202
" locomotor apparatus	64	56
Accidental deaths	149	201
Poisoning	3	6
Suicide	41	44
Homicide	68	43
Influenza	17	110
Other diseases	216	156
Cholera	450	..
Total	16,363	14,596

Exchange.

The following were the average rates of exchange on London in each month during the year 1893, per 1*l.* sterling:—

Month.	Sight.		90 days' Date.	
	Highest.	Lowest.	Highest.	Lowest.
	Lire c.	Lire c.	Lire c.	Lire c.
January.. .. .	26 17	26 15	26 00	25 97
February	26 27	26 22	26 12	26 07
March	26 22	26 17	26 10	26 05
April	26 20	26 10	26 07	26 02
May	26 35	26 30	26 17	26 12
June	26 37	26 32	26 17	26 12
July	27 00	26 97	26 85	26 82
August	27 67	27 62	27 40	27 35
September	28 05	28 00	27 70	27 65
October.. .. .	28 60	28 55	28 42	28 37
November	28 90	28 88	28 72	28 70
December	28 20	28 15	28 02	27 97

the Adriatic. Subventioned by the Government. Owing to improvements in the company's ships required for that service, which entailed heavy outlays, only 6 per cent. dividend could be distributed to the shareholders (1892, 8 per cent.) The company enjoys the sympathy of our commercials, their service being prompt, and goods are well cared for on board.

Engineering Establishments.

The principal concern continues to be that of "Guglielmo Lindemann."

Harbour Accommodation.

Remains the same as before. The clearing of the port is being actively carried on. A jetty-head is going to be constructed in prolongation of the "Via Pozzoli," and the adjacent basin of "San Vito" will have to be filled up in order to join the station of the Adriatic Railway to the tramway Bari-Barletta. The estimated cost is 18,520*l*. These works have been offered for public competition at Rome on March 23, 1894, but the result is not known yet.

Population.

Census.

According to the statistics of the municipality, the population of Bari amounts to 75,641, including the garrison on December 31, 1893, being an increase of 1,368 since the previous year.

Description.					Population.
Births in 1893	..	..	..	..	2,936
Deaths in 1893	..	..	..	..	1,923
Immigrants..	..	..	..	..	495
Emigrants to other places in Italy	..				215
Marriages ..	..	..	..	..	501

Public health.

The predominating diseases during the year 1893 were:—Bronchial catarrh, acute pneumonia, phthisis, typhoid fevers; no epidemics have to be recorded.

Public Works.

Paving.

During 6 months in 1893, 70 workmen have been employed daily in repaving the town at a cost of 7,000*l*, sterling.

New work.

A new school building has been commenced, and is proceeding in construction.

Railway to Lecceotondo.

Towards the end of 1893 the British firm of Armstrong and Co. submitted an offer for constructing the line to "Lecceotondo"

and deposited the caution money; a final decision is to take place in May, 1894.

The number of subscribers during the year 1893 was 171 Telephones. Terms of yearly subscription 6*l.* sterling; extension of wires 30 kiloms.

GIOJA TAURO.

Mr. Vice-Consul Briglia reports as follows :—

The trade of this district in the year 1893 has been much inferior to that of 1892, as well as regards the exportation of olive oil as that of wine. In the former produce there has been a falling off of 2,002 tons, value 70,040*l.* sterling, and of the latter of nearly one-half compared with the quantity of the previous year.

RETURN of all Articles Exported from Gioja Tauro during
the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
Olive oil for abroad ..	Tons. 5,104	£ 178,670	Tons. 5,660	£ 198,100
„ home consumption ..	2,565	89,775	4,011	140,385
Wood and charcoal ..	1,950	2,400	1,000	1,250
Wine	5,000	35,000	11,000	76,000
Total	14,619	305,845	21,671	415,735

The olive crop promised to be an excellent one this year, but the “Scirocco” winds of November last and strong frost in December have injured the fruit on the trees, and reduced the quantity to about three-fourths; but it is hoped that if no other calamities intervene 13,000 tons to 14,000 tons of olive oil will be obtained; this quantity will stand for home consumption and exportation in 1894 and 1895.

RETURN of all Shipping at the Port of Gioja Tauro during the Year 1893.

ENTERED.*

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	3	358	1	972	4	1,330
Danish	...	...	2	1,497	2	1,497
Italian	290	12,890	72	21,600	362	34,100
Total	293	12,898	75	24,069	368	36,927

* The same number cleared within the year 1893.

Public works. The line of railway from Reggio to Eboli will be finished at the end of this year, which will shorten the distance from Naples by 12 hours; the time from Gioja to Naples employed by rail now being 22 hours, which after the completion of the above said branch-line will be reduced to 10 hours only.

MANFREDONIA.

Mr. Vice-Consul Cafarelli reports as follows:—

Commerce. The trade with Great Britain is restricted to the importation of coal, of which three cargoes arrive yearly; scarcely any other vessels ever arrive at this port from other foreign countries.

The whole district of Manfredonia is given to agriculture and raising of cattle. 33,000 acres are under cultivation of grain and beans.

Population. The population of Manfredonia was 10,309 in 1893. 489 births, 486 deaths have been recorded during last year.

Harvest prospect. The drought of the last few months has seriously affected all agricultural produce; some rainfall has come since in time to resow the corn, but too late for fruit trees and vines.

MONOPOLI.

Mr. Vice-Consul Pepe reports as follows:—

Agriculture and commerce. Agriculture is in a rather prosperous condition in my district. Olive plants are cultivated on a large scale in the plains, while the vineyards occupy the hill-sides. The agricultural labourer is in a certain easy condition; his wages vary from 1 lira to 1.40 lira per diem. It can be confidently stated that great progress has been made in the improvement of the qualities of the oil and wine, and a very active trade has sprung up with Austria, Nice, Genoa and Marseilles. No shipments are made to Great Britain, which once was a good customer for oil.

No British vessel has entered the harbour for some years, Shipping. and with the exception of an Austrian steamship company at Fiume, the shipping is carried on by local companies.

According to the last census taken in 1881, Monopoli had Population. 21,008 inhabitants, and as no emigration takes place from there, the number must have considerably increased.

SALERNO.

Mr. Vice-Consul Consiglio reports as follows:—

The year ending December 31, 1893, cannot be considered as a Financial very prosperous one, nor as one altogether bad. Many small position. banks have been started during the last few years within this province, which somewhat facilitate commercial operations, and serve as a deposit for savings. Three of them have their chief seat in the principal towns, the "Banca d'Italia" and "Banco di Napoli" having branch offices at Salerno. The administration of the smaller banks has shown itself fairly good during the late financial crisis. We have had no losses to deplore.

Our crops consist chiefly of grain, maize, wine, and oil, and Crops. have given good results as far as quantity goes, although prices, especially for grain and wine, have remained unsatisfactory.

As regards grain, this is owing to the competition of the eastern markets; whilst wine has never recovered from the heavy import duty imposed by France.

Lemons of the Amalfi coast continue to be a most important article of export to Great Britain and the United States, the quality of the fruit being superior to any produced in other parts of South Italy.

The chief articles of import are coal, iron, cotton, chiefly to Imports. supply the manufacturing establishments of the German and Swiss firms of Aselmeyer Pfister and Co., Schlaepfer Wenner and Co., and G. Freitag. The foregoing are manufacturers and spinners of cotton yarns, grey and bleached cotton tissues, prints, &c., and have establishments at Fratte di Salerno, Nocera, Scafati, and Angri. It is noteworthy that amongst the large number of workmen employed by these firms strikes have never taken place.

A large iron foundry has existed for a number of years at Fratte di Salerno, which is especially noted for the excellency of the boilers manufactured there.

At Vietri sul Mare, near Salerno, there are some potteries which produce a very low class of goods for exportation to Sicily and Egypt, and which are fairly employed, the articles having a good demand.

The fertility of the soil would offer great advantages for the extraction of essences and perfumes from flowers, and an excellent article of export might be created by the proper treatment of a very superior kind of sardine caught in large quantities at Cetara. These fish, superior to those of Nantes, if prepared and tinned in a similar manner to the French ones would no doubt command a

large and profitable exportation. The want of capital and enterprise are the reasons why this industry has not been established up to the present time.

Public works.

The drainage works in the plains of Nocera and round Salerno have been completed, and the marshy districts have been dried up, so that in consequence malarial fever has almost disappeared.

In the vicinity of and around Pæstum much has to be done yet, malaria reigning there, especially from July to September. Owing to measures of economy forced upon the Government by the financial crisis, neither the railway line from Salerno to Sanseverino, nor the coast line from Battipaglia to Reggio have progressed much. An important road will, however, be shortly completed which will join the coast of Amalfi to that of Sorrento.

Harbour.

The harbour works have also remained stationary both at Amalfi and Salerno.

RETURN of all Shipping within the Vice-Consular District of Castellamare di Stabia during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	117	93	118,696	94	118,813
Italian	15	7,337	7	6,161	22	13,498
Greek	21	5,792	26	27,325	47	33,117
Turkish	3	415	...	...	3	415
Norwegian	...	...	2	1,751	2	1,751
Russian	1	435	...	...	1	435
German	...	...	1	782	1	782
Belgian	...	...	4	4,405	4	4,405
French	1	147	...	...	1	147
Dutch	...	...	6	4,468	6	4,468
Swedish	...	...	1	767	1	767
Total	42	14,153	140	164,295	182	178,448

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	117	93	118,696	94	118,813
Italian	15	7,337	7	6,161	22	13,498
Greek	21	5,792	26	27,325	47	33,117
Turkish	3	415	...	...	3	415
Norwegian	...	...	2	1,751	2	1,751
Russian	1	435	...	...	1	435
German	...	...	1	782	1	782
Belgian	...	...	4	4,405	4	4,405
French	1	147	...	...	1	147
Dutch	...	...	6	4,468	6	4,468
Swedish	...	...	1	767	1	767
Total	42	14,153	140	164,295	182	178,448

RETURN of Imports and Exports within the Vice-Consular District
of Castellamare di Stabia during the Year 1893.

EXPORTS.

Articles.	Quantity.	Value.
	Tons.	£
Building stones and paving stones	350	175
Maccaroni	4,250	63,750
Green fruit.	8,100	72,500
Dry fruit and nuts .. .	2,746	56,666
Potatoes and vegetables .. .	5,195	10,390
Oil	228	9,120
Wine	266	2,185
Total	21,135	214,786

IMPORTS.

Articles.	Quantity.	Value.
	Tons.	£
Coal.	250,618	250,618
Wheat	71,443	714,430
Old rails	961	3,027
Clay.	417	328
Wood	3,003	7,507
Iron (plates and bars) .. .	4,831	96,600
Total	331,273	1,072,51

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AND FINANCE.

ITALY.

REPORT FOR THE YEAR 1893
ON THE
TRADE, &c., OF THE CONSULAR DISTRICT OF
BRINDISI.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1248.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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I T A L Y.

BRINDISI.

Consul Cocoto to the Earl of Kimberley.

My Lord,

Brindisi, June 16, 1894.

I HAVE the honour to transmit herewith my Annual Report on the Commerce and Agriculture of the Province of Lecce for the year 1893.

I have, &c.

(Signed) S. G. COCOTO.

Report on the Commerce and Agriculture of the Province of Lecce for the Year 1893.

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RETURN of all Shipping at the Ports of Brindisi, Gallipoli, and Taranto during 1893-92.

ENTERED.

Nationality.	Sailing		Steam.		Total, 1893.		Total, 1892.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ..	12	1,157	184	401,719	196	402,876	200	398,383
Italian ..	762	48,716	1,043	922,326	1,745	971,042	1,614	918,200
Austrian ..	20	2,393	206	877,383	316	379,692	323	399,539
Greek ..	65	2,381	1	941	67	3,325	77	3,868
German ..	..	..	8	7,349	8	7,349	55	41,623
Norwegian ..	1	408	6	2,191	7	2,369	47	18,910
Turkish ..	44	1,273	..	..	44	1,273	70	1,817
Macedonian ..	7	612	..	..	7	612	21	529
Danish ..	1	133	..	..	1	133	7	3,870
Other nationalities ..	..	..	1	717	1	717	1	319
Total, 1893 ..	853	56,889	1,569	1,712,629	2,392	1,769,618	..	..
" 1892 ..	824	55,229	1,589	1,739,428	2,404	1,785,648	2,404	1,785,648
Variations ..	29 +	1,769	41 -	17,799	12 -	16,030	..	..

RETURN of all Shipping at the Ports of Brindisi, Gallipoli, and Taranto during 1893-92—continued.

CLEARED.

Nationality.	Sailing.		Steam.		Total, 1893.		Total, 1892.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ..	12	1,157	183	399,887	195	401,044	209	398,583
Italian ..	698	48,130	1,042	921,076	1,740	969,206	1,606	916,803
Austrian ..	20	2,309	296	377,383	316	379,692	323	399,539
Greek ..	65	2,363	1	944	66	3,307	75	3,776
German..	..	..	8	7,349	8	7,349	34	39,943
Norwegian ..	1	408	6	2,191	7	2,599	47	18,190
Turkish..	44	1,273	..	..	44	1,273	70	1,800
Montenegrin ..	7	612	..	..	7	612	20	500
Danish ..	1	133	..	..	1	133	5	319
Other nationalities ..	..	..	1	717	1	717	1	319
Total, 1893 ..	848	56,385	1,537	1,709,547	2,385	1,765,932	..	..
" 1892 ..	812	54,138	1,578	1,728,698	2,390	1,782,736	2,390	1,782,736
Variations ..	+ 36	+ 2,247	- 41	- 19,051	- 5	- 16,804	..	..

BRINDISI.

IMPORTATION and Exportation to and from the Ports of the Province of Lecce, viz., Brindisi, Gallipoli, and Taranto, during the Years 1893-92.

ITALY.

Articles.	Importation.			Exportation.			Total.		
	Coastwise.	International	Total.	Coastwise.	International.	Total.	Coastwise.	International.	Total.
Colonials..	Tons. 266	Tons. ..	Tons. 266	Tons. ..	Tons. ..	Tons. ..	Tons. 266	Tons. ..	Tons. 266
Timber ..	4,250	3,494	7,744	..	..	..	4,250	3,494	7,744
Iron ..	1,710	..	1,710	450	..	450	2,160	..	2,160
Building materials	..	238	238	..	..	..	..	238	238
Cereals ..	..	..	..	10,541	..	..	..	..	10,541
Sulphur ..	2,287	..	2,287	..	..	..	2,287	..	2,287
Oil ..	..	1,515	1,515	11,233	2,095	13,330	11,233	3,910	15,143
Fruits ..	..	548	548	2,104	5,328	7,432	2,104	5,378	7,982
Flour ..	14,482	..	14,482	..	..	..	14,482	..	14,482
Coal ..	7,200	146,967	153,267	..	..	..	7,200	146,967	153,267
Wine ..	..	..	..	16,962	6,399	23,341	16,942	6,399	23,341
Taxiles ..	3,199	..	3,199	..	..	..	3,199	..	3,199
Other articles ..	39,113	41,569	80,712	37,148	13,557	50,705	76,261	55,156	131,417
Total 1893 ..	72,457	193,761	266,218	78,423	27,379	105,802	150,910	221,140	372,050
" 1892 ..	95,912	174,297	270,209	91,569	29,267	120,774	187,419	295,564	396,983
Variations ..	- 23,455	+ 19,464	- 3,961	- 13,084	- 1,888	- 14,973	- 36,509	+ 17,576	- 18,933

BRINDISI.

5

which may be summarised as follows :—

Port.	Imports.	Exports.	Total.	
			1893.	1892.
	Tons.	Tons.	Tons.	Tons.
Brindisi.. ..	209,973	63,955	273,928	296,486
Gallipoli	26,238	11,920	38,158	48,036
Taranto.. ..	44,355	15,609	59,964	46,461
Total, 1893 ..	280,566	91,484	372,050	..
„ 1892 ..	270,209	120,774	390,983	390,983
Variations.. ..	+ 10,357	— 29,290	— 18,933	..

BRINDISI.

The increase in the maritime operations of this port, referred to in previous years, has been maintained as to numbers and tonnage of vessels using same as compared with 1892 ; the figures having been during the last few years :—

Year.					Number of Vessels.	Tons.	Total tonnage.
1890	..	..	..	..	1,370	1,222,858	
1891	..	..	..	..	1,401	1,234,356	
1892	..	..	..	..	1,416	1,395,463	
1893	..	..	..	..	1,377	1,360,336	

RETURN of all Shipping at the Port of Brindisi during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	171	388,096	171	388,096
Italian	183	17,480	610	566,510	793	583,990
German	...	...	7	6,913	7	6,913
Greek	53	1,951	1	944	54	2,895
Norwegian	...	...	3	1,143	3	1,143
Austrian	9	959	292	374,677	301	375,636
Montenegrin	7	612	...	...	7	612
Turkish	41	1,051	...	...	41	1,051
Total	293	22,053	1,084	1,338,283	1,377	1,360,336
„ for the year preceding	294	20,836	1,122	1,374,627	1,416	1,395,463
Variations	— 1	+ 1,217	— 38	— 36,344	— 39	— 35,127

(1811)

A 4

CLEARED.

Nationality.	Sailing.		Steam.		Total	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	170	386,264	170	386,264
Italian	183	17,480	609	365,260	792	382,740
German	...	...	7	6,913	7	6,913
Greek	52	1,943	1	944	53	2,877
Norwegian	...	...	3	1,143	3	1,143
Austrian	9	950	292	374,677	301	375,626
Moroccan	7	612	...	...	7	612
Turkish	41	1,771	...	...	41	1,051
Total	292	22,645	1,082	1,335,201	1,374	1,357,236
“ for the year preceding...	287	20,365	1,120	1,372,617	1,407	1,391,980
Variation ... + 5	+ 1,770	- 38	- 37,416	- 33	- 34,694	

The slight falling-off in the number of vessels is owing to the fact that speculators did not, during the autumn of 1893, employ chartered tonnage for the local trade in the Adriatic, as in previous years; when small Norwegian steamers ran constantly backwards and forwards between Venice, Trieste, and Brindisi.

British
trading
steamers

The 45 British trading steamers which arrived at Brindisi with full cargoes of coal and pitch had, as in former years, to proceed in ballast to loading ports, viz., 13 to Russia, 11 to Roumania, 11 to Constantinople, 2 to Alexandria, and 1 each to ports in Greece, Austria, and Spain; 2 proceeding to Sicilian ports to load, and 3 to Adriatic ports to complete discharge.

TABLE showing the Movement of all Shipping Entered and Cleared during the Year 1893.

Year.	Number of Vessels.		Tons.
	Sailing.	Steam.	
1893	585	2,166	2,717,572
1892	581	2,242	2,787,393
Variation	+ 4	- 76	- 69,821

Coal.

A small decrease has occurred in the imports of coal and pitch during 1893 as compared with 1892, amounting to 5,956 tons.

The importations during those years have been:—

Importers.	Quantity.		Coal importers.
	1893.	1892.	
	Tons.	Tons.	
Railways	25,897	40,872	
Fuel works (including pitch) ..	22,056	19,801	
P. and O. Steam Navigation Com- pany	30,637	31,219	
Navigazione Generale Italiana ..	38,064	32,729	
Private importers	7,837	5,826	
Total	124,491	130,447	

The above 124,491 tons includes 3,544 tons of pitch for use in the manufacture of patent fuel.

The Italian Government imported no coal during 1893 for the use of Government vessels.

The falling-off is entirely in the coal imported by the railway company, the importance of which is dependent on the traffic requirements of the railway lines meeting at the Brindisi Station.

The coal imports to Brindisi have been :—

Country.	Quantity.		
	1893.	1892.	1891.
	Tons.	Tons.	Tons.
Great Britain	119,522	128,622	117,713
France	1,082	661	1,812
Belgium	3,143		
Austria	744	1,164	683
Total	124,491	130,447	119,658

The importation of a cargo of Belgian coal by the P. and O. Steam Navigation Company, consisting of 2,336 tons of coal, and 807 tons patent fuel, took place during the miners' strike, and has not been repeated.

British shipowners for many years past have preferred Brindisi as a discharging port for coal cargoes in consequence of the rapid discharge ships received, possibly equalled by Malta and Port Said, but unsurpassed elsewhere; and were willing to take a low rate of freight in consideration of the facilities thus offered.

Unfortunately, the railway company and the Navigazione Generale Italiana, two important receivers of coal cargoes, have recently adopted the system of exacting the payment of despatch money, or, in default, detaining the vessels uselessly the whole of their charter party time, with the result that Brindisi is fast losing its good name as a port offering special advantages, freights having fallen to a minimum figure, a difficulty is now being felt in finding tonnage for Brindisi, except at enhanced rates of freight.

Despatch
money
exactd on
coal cargoes.

This short-sighted policy on the part of some of the consignees of coal cargoes can only be the result of misapprehension, the hitherto prevailing low rates of freight depended on the fact of certain facilities existing, such facilities being now dependent on the payment of heavy sums for despatch, have ceased to exist and the port has lost its good name.

I may instance that the P. and O. Steam Navigation Company despatch a collier with about 3,000 tons of coal in 2 days without exacting despatch, and consequently get ships for from 9*d.* to 1*s.* a ton less than other receivers.

The British shipping which has used the port of Brindisi during 1893 may be thus classified :—

	1893.		1892.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
P. and O. Steam Navigation Company—				
Brindisi-Alexandria line	15	23,303	23	41,316
London, India, China, and Australia services	103	286,394	102	268,304
Cunard Company	4	5,615	8	10,249
Vessels coal laden	46	65,115	51	63,061
„ in ballast or for orders	3	2,669	4	5,230
Total, 1893	171	388,096	188	388,160
„ 1892	188	388,160	..	..
Variation	— 17	— 64	..	..

The decrease in the number of vessels is owing to the partial discontinuance of the P. and O. Company's Alexandria line, and a diminution in the number of Cunard steamers which have used the port owing to shortness of trade. The tonnage has been maintained by the increasing dimensions of the steamers employed on the P. and O. Company's mail services, &c.

The following represents the movement of passengers so far as I have been able to ascertain the same.

PASSENGER Movement at the Port of Brindisi during the
Year 1893.

Service.	Number.			
	Arrived.	Landed.	Embarked.	Sailed.
P. and O. Steam Navigation Company—				
London, India, China, and Australia lines ..	13,556	2,549	2,689	13,696
Alexandria line ..	..	357	653	..
Navigazione Generale—				
Greek-Turkish lines ..	..	4,082	2,857	..
Alexandria line ..	441	247	269	324
Austrian Lloyds—				
Alexandria line ..	2,512	797	456	1,752
Total	16,509	8,032	5,924	15,772

The fortnightly free service instituted by the P. and O. Company on the cessation of their mail contract with the Italian Government, between Italian ports and Egypt, though maintained regularly between Genoa, Naples, and Alexandria, has only been carried on between Brindisi and Alexandria during those seasons of the year when there was an extraordinarily large number of passengers outward and homeward bound.

It has been found that the tourist element preferred Genoa and Naples as ports of embarkation to Brindisi, and the P. and O. Company's passengers to and from Egypt during 1893 have been mostly tourists.

The Navigazione Generale Italiana, commonly known as the "Florio Company," has much improved the steamers running fortnightly between the Adriatic ports and Alexandria. This line and the Austrian Lloyd weekly Alexandria service have both been abundantly patronised by the travelling public.

As compared with the 3 preceding years the following passengers have used the P. and O. Company's main lines hence:—

Year.	Number.			
	Arrived.	Landed.	Embarked.	Sailed.
1893	13,556	2,549	2,689	13,696
1892	14,016	2,309	2,523	14,234
1891	13,025	2,769	2,671	12,927
1890	13,726	3,452	3,473	13,615
Compared with—				
1892	— 460		+ 166	— 538
1891	+ 531	— 220	— 18	+ 769
1890	— 170	— 903	— 784	+ 81

From the above it will be seen that the falling-off in the number of passengers who have used the P. and O. main lines has not been important as compared with former years, particularly taking into consideration that the company run a fortnightly outward line from London to Naples and Calcutta, meeting the steamers employed on the Genoa-Alexandria line at Naples, and a homeward line from India to Marseilles and London.

British crews. The aggregate number of British crews which visited Brindisi during 1893, as compared with preceding years, has been:—

Year.						Number of Seamen.
1893..	..	..	..	..	..	26,128
1892..	..	..	..	..	..	26,812
1891..	..	..	..	..	..	28,630
1890..	..	..	..	..	..	28,398

The falling-off under this head is explained by the diminution in the P. and O. Company's services, and the diminished number of calls of Cunard steamers; it would have been greater but for the heavier tonnage and more numerous crews of the P. and O. Company's steamers now employed on the main line mail services.

The trade with America hence remains as in 1892, no improvement, so far, having taken place.

Mail services. The mail services hence to Greece have undergone modification.

The Italian mail steamers leave twice weekly; once for Corfu and Patras on Sundays, and once for Corfu, Patras, Piræus, and Constantinople on Wednesdays.

The Austrian Lloyd run a weekly steamer on Sunday to Corfu, Patras, Piræus, and Constantinople.

All the above steamers leave at midnight after the arrival of the evening mail train.

The Austrian Lloyd run a weekly service on Saturdays and the Navigazione Generale Italiana a fortnightly service on alternate Thursdays to Alexandria.

The Austrian Lloyd run a four-weekly service hence to Port Said, Aden, and Bombay; and in July, 1894, the Italian Government purpose instituting a similar Italian service to connect Adriatic ports and Bombay.

A new service under contract with the Italian Government has been inaugurated between Brindisi, ports on the Albanian and Dalmatian coast, and Ancona, starting fortnightly from Brindisi to Valona.

A weekly service under the Austrian flag is maintained between Ragusa and Brindisi.

In addition to the above, there are almost daily steamers coasting to and from Cetta, Marseilles, Genoa, Leghorn, Naples, Sicilian and Calabrian ports on the one hand, and Fiume, Trieste, Venice, Ancona, and Bari on the other, connecting with other lines

running to all parts of the Mediterranean, Northern Europe, North and South America, making Brindisi the centre of a large web of commercial communications.

The steamers performing these services belong to the Navigazione Generale Italiana, the Puglia Company, the Adria Company of Bari, and the Adria Company (Hungarian) of Fiume.

The movement of mails shipped by and landed from the steamers of the P. and O. Company, under contract with H.M.'s Government, was as follows during 1893-92 :—

Mail statistics
to India,
China, and
Australia.

Nationality.	1893.		1892.	
	Landed.	Shipped.	Landed.	Shipped.
	Bags.	Bags.	Bags.	Bags.
British	15,187	54,198	14,794	44,906
French	1,405	4,043	1,386	3,751
Dutch	422	1,177	378	
Swiss	329	305	292	
German	840	3,637	717	9,149
Austrian	246	1,600	172	
Italian	1,681	5,375	1,105	
Total	20,110	70,335	18,844	57,806

An increase of 1,266 bags landed, and 12,529 bags shipped, and a total increase of nearly 20 per cent. between 1893 and 1892.

The following gives the movement of international mails between Italy, Greece, and Turkey, viâ Brindisi, during 1893-92.

Mail statistics
with Greece
and Turkey

Royal Mail Services.	1893.		1892.	
	Arrived.	Despatched.	Arrived.	Despatched.
	Bags.	Bags.	Bags.	Bags.
Italian, thrice each week till October, 1893, twice since	4,434	9,618	8,557	11,027
Austrian, weekly ..	1,809	1,621	2,986	1,839
Total	6,243	11,239	11,543	12,866
Grand total ..	17,482		24,409	

The diminution is to be attributed to a falling-off in the mails for Turkey, a larger proportion of which is now sent overland viâ Vienna.

The mails to Egypt during 1893 were as follows :—

Mails to
Egypt.

	Departures.		Arrivals.		Total Number of Bags
	Number.	Number of Bags.	Number.	Number of Bags.	
Austrian Lloyd's ..	52	5,032	52	2,848	..
Navigazione G.I. ..	26	2,159	26	778	..
Total	..	7,191	..	3,626	10,817

Export. RETURN of Principal Articles of Export from Brindisi during the
Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Wine	Tons ..	8,128	138,861	6,566	84,300
Oil .. .. .	.. ..	438	21,463	825	36,291
Figs .. .. .	.. ..	2,667	42,800	3,375	40,506
Larders .. .. .	.. ..	2	4	..	..
Buttery .. .. .	.. ..	180	1,668	58	1,007
Drugs .. .. .	.. ..	1	9	1	73
Soap .. .. .	.. ..	..	..	9	189
Sulphur .. .. .	.. ..	40	128	..	..
Gum .. .. .	.. ..	..	..	11	198
Macaroni .. .. .	.. ..	6	112	..	..
Seeds .. .. .	.. ..	..	..	11	106
Corals .. .. .	.. ..	..	71,947	..	61,360
SEA-SKINNED EGGS ..	.. ..	646	6,798	..	1,148
Locust beans	Tons ..	16	46	..	..
Hats	Number ..	400	19	240	11
Empty casks	Hundred ..	9,143	2,500	1,961	532
Apples	Tons ..	275	14,279	318	12,701
Other articles .. .. .	.. ..	1,212	27,894	465	32,335
Total, 1893	Hectolitres ..	9,143	327,385	1,961	271,257
.. .. .	Number ..	400		240	
.. .. .	Tons ..	14,466	271,257	11,659	..
.. .. .		..		..	
Variation .. .. .	.. ..	..	56,128	..	..

RETURN of Principal Articles of Import to Brindisi during the Import.
Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Wines and spirits	... Tons ...	4	163	6	430
Oil	... ..	9	262	15	466
Petroleum	... ..	262	2,197	165	1,062
Coffee	... ..	75	6,872	83	7,099
Sugar	... ..	169	3,433	123	2,156
Sulphates	... ..	38	975	22	262
Chemicals	... ..	3	105	28	447
Dyes and indigo	... ..	41	8,460	34	16,301
Firewood	... ..	240	230	232	223
Timber	... ..	2,579	5,983	4,056	11,356
Furniture	... ..	12	787	18	1,092
Rushes	... ..	274	2,194	537	4,294
Wallpapers	... ..	2	136	2	138
Ironwork	... ..	87	2,804	91	2,316
Coal	... ..	124,491	149,389	130,447	114,793
Cereals	... ..	1,980	15,863	3,576	25,873
Machinery	... ..	8	850	3	278
Empty casks	... ..	1,579	442	4,673	1,308
Animals	... ..	4,133	22,169	6,573	42,463
Game, poultry, and fish	... ..	96	3,214	24	934
Other articles	... ..	418	67,534	697	78,384
Total, 1893	... Hectolitres	1,579	294,062	4,673	312,160
" "	... Number	4,133		6,573	
" "	... Tons	130,786	312,160	151,395	...
" 1892	... ..	...		...	
Variation	... ..	...	- 18,098	...	...

The increase in the value of exports is mainly to be attributed to an augmented exportation of wine. Variation of exports and imports.

The decrease in imports is mainly to be found under the headings of coffee, indigo, timber, rushes, cereals, animals, and sundry articles; this diminution is to a certain degree compensated by an increase in the value of coal importations.

TABLE showing Total Value of all Articles Exported from and Imported to Brindisi to and from Foreign Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
America	8,036	23,413	3,247	1,424
Austria	159,395	44,516	39,337	33,005
Belgium	..	431	3,771	236
Egypt	14,281	26,361	1,419	3,391
France	219	318	1,892	4,983
Germany	823	35,380	15,569	16,635
Great Britain ..	10,177	20,590	159,618	152,323
Greece	3,975	16,353	3,947	3,535
India	10,710	2,085	17,609	16,505
„ (Morals)	68,554	61,860	..	..
Japan	..	350	..	49
Russia	24	4,695	2,344	5,280
Turkey	5,900	15,425	27,582	82,073
Other countries ..	22,819	19,919	12,946	13,495
Total	324,993	271,666	288,931	333,851
„ 1892	271,046	..	333,851	..
Variation .. +	53,927	..	- 44,920	..

COASTWISE Trade of Brindisi for the Years 1893-92.

Articles.	1893.		1892.	
	Exports.	Imports.	Exports.	Imports.
	Tons.	Tons.	Tons.	Tons.
Flour	..	3,782	..	4,399
Sugar	..	181	..	612
Timber	..	310	..	536
Ironwork	..	1,710	..	250
Sulphur	..	1,027	..	3,000
Cottons	..	2,769	..	3,801
Hides	37	56	..	400
Oil	1,980	..	5,850	..
Cereals	2,624	..	4,506	..
Fruit	2,104	..	8,133	..
Wine	2,837	..	19,638	..
Other articles ..	32,465	31,845	15,178	48,000
Total	42,947	41,710	53,365	60,498
„ 1892	53,365	60,498	..	..
Variation .. -	11,208	- 18,788	..	..

This was brought and taken away by—

	1893.		1892.	
	Loaded.	Unloaded.	Loaded.	Unloaded.
	Tons.	Tons.	Tons.	Tons.
Sailing vessels	9,423	2,601	215	1,664
Steamers	32,624	39,109	53,140	58,834
Total	42,047	41,710	53,355	60,498

The carrying trade between Brindisi and foreign countries may be similarly summarised :—

Articles.	1893.		1892.	
	Exports.	Imports.	Exports.	Imports.
	Tons.	Tons.	Tons.	Tons.
Coal	..	124,491	..	180,447
Cereals	..	..	..	3,577
Timber	..	2,577	..	4,052
Olive oil	513	..	824	..
Wine	5,289	..	6,585	..
Fruit	3,589	..	3,276	..
Pottery	..	..	52	..
Sundries	12,519	..	11,384	22,436
Total	21,908	168,263	22,121	160,512
Grand total ..	190,171		182,633	

This was brought and taken away as follows :—

	1893.		1892.	
	Loaded.	Unloaded.	Loaded.	Unloaded.
	Tons.	Tons.	Tons.	Tons.
Sailing vessels	800	5,479	419	1,589
Steamers	21,108	162,784	21,702	158,923
Total	21,908	168,263	22,121	160,512

The gross results of the year being :—

Year.	Quantity.		
	Unloaded.	Loaded.	Total.
	Tons.	Tons.	Tons.
1898	209,973	63,955	273,928
1892	221,010	75,476	296,486
Variation	- 11,037	- 11,521	- 22,558

Commerce of
1893 was
unsatisfactory.

The year 1893 compares unfavourably with 1892, the falling-off in both exports and imports affecting the great majority of articles; the general stagnation in trade has not spared Brindisi.

Dredging.

But little dredging has been carried out during the year 1893, the contractor, early in the current year, having promptly worked out the amount of the parliamentary vote for the year, transferred the whole of his dredging material to Barletta, where he is working.

Proposed
completion of
necessary
harbour im-
provements:
deferred
payment of
cost of same.

Early in the year 1893, the Mayor of Brindisi, Cav. E. Dionisi, did his best to initiate an agreement between the Government, the province, the town of Brindisi, and the harbour works contractor; having for its object the prompt completion of the works needed to render the inner harbour more easily accessible to vessels of the very heaviest draught of water; and to provide adequate coaling quays for the use of steamers coaling here regularly, such as the P. and O. Company and the Navigazione Generale Italiana, in lieu of the present inconvenient arrangement of coaling in the channel connecting the inner and outer ports. The works would have comprehended the building of about 650 yards length of deep water quays, and the entire removal of the "Fico" shoal in the outer harbour, and were estimated to cost 80,000*l.* or thereabouts.

The contractor was understood to be disposed to accept deferred payments for the said works, but a ministerial crisis, followed by a municipal crisis at Brindisi, caused the negotiations to fall into abeyance.

This year Sig. Dionisi is again Mayor, and it is to be hoped that he will be able to recommence and carry the negotiations to a successful issue. In view of the increasing dimensions and tonnage of the vessels which perform H.B.M.'s mail service to and from this port, of colliers and steamers generally, the works projected cannot but be deemed to be of primary utility.

Theatre

The works of this edifice interrupted during the municipal crisis are now being continued.

Aqueducts.

Negotiations are still pending in regard to this work, but no definite steps are being taken to commence works, the municipality are now paying the "Società Italiana per Condotte d'acqua of Rome" the cost of the surveys made to serve as a basis of all projects; so that it will be free to treat with any firm it pleases.

In my report of May 20, 1893, for the year 1892, printed under No. 1248, I gave detail of the various projects, and cannot but think that the same might prove satisfactory to British enterprise.

I regret to say that absence of funds delays the consideration of this much-needed work. The improvement in public health which must inevitably result from the completion of a system of drainage would certainly be enormous. Drainage.

In my last report I mentioned that a joint stock company had been formed to undertake the town lighting. I am happy to say that this project has been carried into effect, and that since October, 1893, the whole of the town has been lit by electricity, not even the most out-of-the-way slum being without its electric lamp. Electric lighting.

The works are situate near the railway station, having been built expressly; two 100 H.P. inexplodible boilers have been supplied by Messrs. F. Tosi and Company, of Legnano, who have also supplied two 100 H.P. and one 25 H.P. engines.

The 100 H.P. engines, each drive two 50 H.P. gramme dynamos, working in series, supplied by the Edison Company, of Milan, each couple being of the capacity of 1,000 16-candle power incandescent lamps.

The 25 H.P. engine drives a 30 arc lamp Thompson Houston dynamo, whilst another engine of 10 H.P. drives a 20 arc lamp dynamo by the same makers.

At the present moment the company supplies 20 arc lamps of 1,200 candle power, for the principal streets and quay, and 240 incandescent lamps for secondary thoroughfares, and about 700 incandescent lamps for hotels, cafés, restaurants, and private residences; but the demand for light is increasing as the population becomes accustomed to it, so that the company will in all probability require to lay down another 100 H.P. boiler and engine, and two other 50 H.P. dynamos to enable them to supply all requirements, and at the same time maintain spare machinery ready in case of accident.

The energy for the incandescent illumination is conveyed by triple cable to six principal points of the city, whence it is distributed. The private consumers lighting being supplied by separate systems of wiring from that employed for the maintenance of the public street illumination.

The three wire system is universally applied for the incandescent service, this being carried out in the interior lighting of houses.

The company, though formed in a great measure by foreign capital, has deemed it expedient to avail of Italian manufactured machinery where possible.

As a matter of fact, except the two Thompson Houston dynamos from the United States, and the leather belting from Messrs. Fleming and Company's Works, Halifax, Yorkshire, the whole of the machinery and materials used are of Italian manufacture; they work perfectly and give the most entire satisfaction.

Experienced English engineers and electricians, who have
(1811)

visited the works, have expressed the most unqualified approval of the machinery and the installation generally.

Lighthouses.

The Italian Government has carried into effect important changes in the lights of this port, with the result that vessels entering the port at night, find red lights on the right hand side and green lights on the left.

When leaving the port at night, a newly erected light serves as a guide for the outer harbour fairway; this will be of considerable assistance to mariners; as, until the complete removal of the Fico shoal opens a new straight fairway from the inner harbour channel to the lighthouse on the Petagne Rocks, the existing fairway required such a light in view of the increased tonnage and dimensions of steamers using the port.

At St. Cataldo, 20 miles from Brindisi, there is shoal water to a considerable distance from shore; and no proper light existing, many ships grounded on the coast, some becoming total losses. The Italian Government at the earnest solicitation of H.M.'s Embassy has now decided to erect a lighthouse of the 4th class, which, visible at a distance of 12 miles, will be a valid assistance to mariners.

GALLIPOLI.

Mr. Vice-Consul Zarb reports as follows :—

Movement of
shipping

The movement of shipping during 1893 has but slightly fallen from the numbers it had attained during 1892; the tonnage, however, instead of falling in a similar ratio, has augmented in consequence of the marked increase in the tonnage of vessels now engaged on the coastwise trade.

During the past 3 years the following vessels have entered and cleared :—

Year.					Number of Vessels.	Tons.
1893	..	..	..	..	1,242	438,326
1892	..	..	..	..	1,328	431,034
1891	..	..	..	..	1,042	392,662

RETURN of all Shipping at the Port of Gallipoli during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	12	1,157	1	1,126	13	2,283
Italian	328	17,977	248	194,089	576	212,066
Austrian	10	743	3	2,193	13	2,936
Danish	1	133	...	...	1	133
German	...	...	1	436	1	436
Greek	12	139	...	...	12	139
Norwegian	...	...	3	1,048	3	1,048
Turkish	2	122	...	...	2	122
Total	365	20,271	256	198,892	621	219,163
„ for the year preceding ...	390	22,357	274	193,210	664	215,567
Difference	— 25	— 2,086	— 18	+ 5,682	— 43	+ 3,596

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	12	1,157	1	1,126	13	2,283
Italian	328	17,977	248	194,089	576	212,066
Austrian	10	743	3	2,193	13	2,936
Danish	1	133	...	...	1	133
German	...	...	1	436	1	436
Greek	12	139	...	...	12	139
Norwegian	...	...	3	1,048	3	1,048
Turkish	2	122	...	...	2	122
Total	365	20,271	256	198,892	621	219,163
„ for the year preceding ...	390	22,357	274	193,210	664	215,567
Difference	— 25	— 2,086	— 18	+ 5,682	— 43	+ 3,596

The trade, coastwise, has been during 1893—

Trade
coastwise.

Articles.	1893.		1892.	
	Unloaded.	Loaded.	Unloaded.	Loaded.
	Tons.	Tons.	Tons.	Tons.
Flour	3,400	..	2,447	..
Cereals	..	..	1,113	1,113
Timber	1,700	..	2,860	..
Oil	..	5,800	985	2,807
Sulphur.. ..	1,200	..	..	..
Wine	..	12,500	..	17,000
Other articles	4,886	2,580	9,118	2,420
Total	10,686	20,880	16,023	23,350
Grand total	31,566		39,373	

This was brought and taken away by—

	1893.		1892.	
	Unloaded.	Loaded.	Unloaded.	Loaded.
	Tons.	Tons.	Tons.	Tons.
Sailing vessels	5,899	7,974	9,485	11,925
Steamers	4,787	13,806	6,554	11,425
Total	10,686	20,880	16,023	23,350
Grand total	31,563		39,373	

International
trade.

The international trade during the same period has been—

Articles.	1893.		1892.	
	Unloaded	Loaded.	Unloaded.	Loaded.
	Tons.	Tons.	Tons.	Tons.
Timber	800	..	1,218	..
Petroleum	210	..	387	..
Coffee	..	..	84	..
Olive oil	..	1,547	..	4,596
Fruit	..	1,669	..	2,000
Wine	..	1,112	..	42
Other articles	224	1,030	371	67
Total	1,234	5,358	1,958	6,705
Grand total	6,592		8,663	

which was brought and taken away by—

	1893.		1892.	
	Unloaded.	Loaded.	Unloaded.	Loaded.
	Tons.	Tons.	Tons.	Tons.
Sailing vessels	1,234	4,289	1,002	5,200
Steamers	..	1,068	956	1,505
Total	1,234	5,357	1,958	6,705
Grand total	6,591		8,663	

British
shipping
Italian
shipping

The number of British vessels which called at Gallipoli during the year was two less than in 1892.

Notwithstanding that Italian steamer lines have maintained their regular services at Gallipoli, it does not appear that such extensive facilities have been compensated by increase in trade.

Year.	Number of Vessels.	Tonnage.	Goods.
1893	1,003	422,485	Tons. 38,158
1892	1,328	431,034	48,033
1891	1,042	392,662	42,519

Olive oil shipments have been as follows during the past 4 years :— Olive oil shipments.

Year.	Quantity.	Value.
	Tons.	£
1893	4,368	157,248
1892	5,092	182,009
1891	6,519	241,279
1890	4,633	183,509

Wine exportation during the past 4 years from the port of Gallipoli has been as follows :— Wine exports.

	Quantity.			
	1893.	1892.	1891.	1890.
	Tons.	Tons.	Tons.	Tons.
Coastwise	12,500	17,000	8,993	11,240
International	1,112	42	50	6
Total	13,612	17,042	9,043	11,246

RETURN of Principal Articles of Import to Gallipoli during the
Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Timber	2,580	7,640	3,498	8,395
Iron and metals ..	430	8,084	145	2,700
Sugar	111	2,708	119	2,686
Coffee	11	988	23	1,980
Codfish	80	1,850	120	2,460
Sardines	20	600	9	311
Petroleum	374	4,719	318	3,120
Pepper and drugs ..	2	167	4	240
Rice	3	119	8	120
Staves and hoops ..	3,649	6,717	2,482	4,866
Sulphur	745	2,128	1,809	5,697
Cotton, hemp, and flax ..	784	9,868	421	10,460
Cereals	1,912	13,722	2,009	13,946
Flour	1,459	17,862	2,769	34,487
Butter and cheese ..	16	1,307	16	1,034
Hides	233	15,504	126	8,140
Paper and books ..	1	88	4	156
Chestnuts and potatoes ..	57	159	160	800
Bricks and marbles ..	37	99	72	180
Coal	..	..	175	262
Textiles	7	1,318	15	2,844
Other articles	41	1,100	87	2,735
Total	12,157	90,797	14,431	109,459
„ 1892	14,431	109,459	..	..
Variation	- 2,274	- 12,662	..	..

RETURN of all Articles of Export from Gallipoli during the
Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Olive oil	4,368	157,248	5,092	182,009
Wine	17,091	128,158	14,340	46,366
Empty casks	1,887	4,160	867	2,360
Dried figs	2,500	16,086	2,161	15,860
Olive husks	3,386	1,306	976	398
Cereals	363	1,327	115	513
Flour	14	166	..	..
Grapes	475	1,268	..	..
Spirit	184	5,197	1,062	21,657
Wool	6	274	..	..
Other articles	20	432	10	215
Total	30,334	315,762	24,613	269,218
„ 1892	24,613	269,218	..	..
Variation	+ 5,721	+ 46,544	..	..

TABLE showing Total Value of all Articles Exported from and Imported to Gallipoli to and from Foreign Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	160,312	110,908	938	1,911
Italy	99,037	108,638	34,721	57,489
France	15,470	11,263	117	482
Austria	10,180	16,588	56,598	44,963
Russia	21,473	17,490	..	..
Germany	2,900	1,701	644	..
Switzerland	1,666	1,214	60	..
America	4,864	471	3,719	4,614
Greece	..	127	..	..
Other countries ..	400	823	..	..
Total	315,752	269,218	96,797	109,45
„ 1892	269,218	..	109,459	..
Variation	+ 46,534	..	- 12,662	..

TARANTO.

The post of British Vice-Consul at Taranto being vacant, I have been able to collect the following information as to commerce and navigation only :—

RETURN of all Shipping at the Port of Taranto during the Years 1893-92.

ENTERED.

Description.	Sailing Vessels.	Steamers.	Total.	Crews.	Tonnage.
Coastwise	187	187	374	7,771	175,819
International	8	12	20	318	14,300
Total	195	199	394	8,089	190,119
„ 1892	262	177	439	7,553	176,399
Difference	- 67	+ 22	- 45	+ 531	+ 13,720

CLEARED.

Description.	Sailing Vessels.	Steamers.	Total.	Crews.	Tonnage.
Coastwise	186	187	373	7,808	176,332
International	5	12	17	294	13,181
Total	191	199	390	8,102	189,513
„ 1892	250	171	421	7,355	169,052
Difference	- 59	+ 28	- 31	+ 747	+ 20,461

ITALY.

IMPORTED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	..	..	12	12,497	12	12,497
Italian	191	13,359	185	161,727	376	174,086
Norwegian	1	408	..	..	1	408
Turkish	1	100	..	..	1	100
Greek	1	294	..	..	1	294
Austrian	1	607	1	513	2	1,120
Belgian	..	..	1	717	1	717
Total	196	14,665	199	175,454	394	190,119

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	..	..	12	12,497	12	12,497
Italian	187	12,653	185	161,727	372	174,380
Norwegian	1	408	..	..	1	408
Turkish	1	100	..	..	1	100
Greek	1	294	..	..	1	294
Austrian	1	607	1	513	2	1,120
Belgian	..	..	1	717	1	717
Total	191	14,679	199	175,454	390	189,583

Trade
coastwise

The coastwise trade during 1893-92 was—

Articles.	1893.		1892.	
	Unloaded.	Loaded.	Unloaded.	Loaded.
	Tons.	Tons.	Tons.	Tons.
Coal	7,200	..	4,500	..
Timber	2,220	..	2,950	..
Building materials	..	..	2,800	..
Cereals	..	7,917	2,400	4,350
Flour	7,300	..	1,800	250
Sugar	..	..	500	..
Olive oil	..	3,453	..	2,200
Iron	..	450	..	1,200
Wine	..	1,605	..	780
Other articles	8,006	2,966	4,441	6,022
Total	24,726	15,496	19,391	14,802
.. 1892	19,391	14,802	..	..
Variation	+ 5,335	+ 694	..	..

This was brought and taken away by—

Vessels.	1893.		1892.	
	Unloaded.	Loaded.	Unloaded.	Loaded.
	Tons.	Tons.	Tons.	Tons.
Sailing vessels	15,271	9,071	6,719	8,546
Steamers	9,455	6,425	10,672	6,256
Total	24,726	15,496	19,391	14,802
„ 1892	19,391	14,802	..	..
Variation	+ 5,335	+ 694	..	..

The international exports and imports being—

International
trade.

Articles.	1893.		1892.	
	Unloaded.	Loaded.	Unloaded.	Loaded.
	Tons.	Tons.	Tons.	Tons.
Coal	21,576	..	8,600	..
Petroleum	1,605	..	1,700	..
Timber	117	..	950	..
Railway bars	..	..	200	..
Vegetables	543	17	170	..
Coffee	..	..	80	..
Olive oil	..	35	..	250
Figs	..	53	..	120
Cereals	..	..	..	40
Other articles	418	8	..	31
Total	24,264	113	11,827	441
„ 1892	11,827	441	..	..
Variation	+ 12,437	— 328	..	..

which were brought and taken away by—

Vessels.	1893.		1892.	
	Unloaded.	Loaded.	Unloaded.	Loaded.
	Tons.	Tons.	Tons.	Tons.
Sailing vessels	2,207	113	2,632	295
Steamers	22,057	..	9,195	146
Total	24,264	113	11,827	441

RETURN of Principal Articles of Import to Taranto during
the Years 1893-92.

Articles	1893.		1892.	
	Quantity.	Value	Quantity	Value
	Tons.	£	Tons.	£
Petroleum	1,865	13,450	1,769	14,000
Dried fish	45	1,004	107	2,000
Coal	28,776	34,531	8,675	8,500
Building materials ..	..	..	180	2,000
Cotton	73	4,450	82	5,000
Timber	1,826	6,944	950	34,000
Iron bars	10	57	210	1,000
Metal	72	436	165	1,000
Cereals	542	3,716	175	1,200
Other articles	16,638	23,000	135	1,000
Total	48,990	101,206	12,429	70,700
„ 1892	12,429	70,700	..	..
Variation	+ 36,561	+ 30,506	..	..

RETURN of Principal Articles of Export from Taranto during
the Years 1893-92.

Articles	1893.		1892.	
	Quantity.	Value	Quantity.	Value
	Tons.	£	Tons.	£
Olive oil	629	20,776	1,250	62,000
Dry fish	885	10,610	245	200
Cereals	276	4,008	..	..
Iron	..	..	..	..
Wine	100	6,914	..	..
Other articles	13,410	17,321	10	100
Total	15,300	69,808	1,505	62,300
„ 1892	1,505	62,300	..	..
Variation	+ 14,104	+ 7,548	..	..

TABLE showing Total Value of all Articles Exported to and Imported from Foreign Countries from and to Taranto during the Years 1893-92.

Country.	1893.		1892.	
	Exports.	Imports.	Exports.	Imports.
	£	£	£	£
Great Britain	3,126	37,147	520	9,000
Austria	15,946	3,552	2,000	7,000
United States of America		8,811	240	7,800
Russia	24,192	2,005	8,800	6,200
Belgium	..	857	..	1,200
Norway	..	168	..	2,700
France	1,200	5,723	800	1,200
Germany	..	369	..	..
Other countries	892	323	24	600
Total	45,356	53,955	12,384	35,700
„ 1892	12,384	35,700	..	..
Variation	+ 32,972	+ 23,255	..	..

The following figures which resume the commercial operations of the port of Taranto demonstrate that an improvement has taken place during 1893 as compared with preceding years.

The falling-off in the number of vessels which used the port during 1893 as compared with 1892-91 is more than covered by the large increase in the tonnage of ships, the total quantity of goods landed and shipped, and the marked increase in values of shipping, increase in trade.

Year.	Number of Vessels.	Total Tonnage.	Goods.	Total Value of Goods.
			Tons.	£
1893	784	379,652	64,599	150,286
1892	875	352,759	46,461	133,050
1891	854	333,612	50,123	456,210
1890	705	272,415	77,893	..

Necessarily this movement is solely consequent on the fact that Taranto Arsenal has been utilised during 1893 as a repairing and supply station for the fleet, whereas previously the importations consisted of material for the construction of the arsenal.

A decided improvement is visible in the town of Taranto, which is gradually losing its provincial city appearance and assuming that of a naval arsenal.

Works connected with the fortification of the port are in progress, a portion of which are intended to be of the most formidable character. Arrangements have been made on an extensive

scale for torpedo defence, all of which are calculated to protect the arsenal from attack by sea. I do not hear, however, that much has yet been done as to land defence.

No improvement has yet been effected in the commercial port, which is as exposed as ever, rendering the expense of landing and shipping cargo from and to steamers half-a-mile from the shore an expensive operation, and extremely difficult when westerly winds prevail.

Agriculture.—Province of Lecce.

Considerable difficulty has arisen in obtaining information under this head. The Chamber of Commerce, for the second time in immediate succession, has been unable for various reasons to issue annual printed statistics. I have in consequence had to seek information from other sources to add to such information as had been collected and classified by the Chamber of Commerce, and which was placed at my disposal by the president of that body.

Weather.

During the earlier months of the year 1893 frosts and cold dry weather, whilst to a certain extent favouring the cultivation of cereals, was unfavourable to vine culture, the principal product of the province. Wet weather following in the spring left the vines an easy prey to the peronospora, which dreaded disease invaded the greater number of the vineyards with disastrous results, the loss being estimated as quite three-fifths of the anticipated crop.

Cereals.

Hail storms fortunately were not so severe as in former years. The total production of wheat was 1,077,800 hectolitres, and of barley 195,000 hectolitres, equal to 3,500,000 bushels, which, at 18 lire per hectolitre for wheat, and 8.50 lire for barley, or 5s. 3d. per bushel for wheat and 2s. 6d. for barley, gave a total value of 776,000*l.*, being 96,000*l.* more than 1892, but 168,000*l.* less than 1891.

Beans, haricots, lentils, and peas collectively gave a total of 36,400 hectolitres, or 100,000 bushels, the medium prices during the year being, per bushel, beans, 11s. 6d.; haricots and peas, 16s.; and lentils, 16s. 10d., giving a gross total value of 24,656*l.*, an increase of 15,000 bushels and 5,656*l.* value as compared with 1892.

The crop of oats and lupins, though an improvement on that of 1892, cannot be deemed even a middling yield, the production having been 1,020,000 hectolitres, or 2,805,000 bushels of oats, at an average price of 5s. 10d. per bushel, and 16,000 hectolitres, or 44,000 bushels of lupins at 6s. 5d., the total value of crop amounting to 299,064*l.*, or 104,000*l.* more than 1892.

But 8,000 hectolitres or 22,000 bushels of Indian corn came to market, the price being 8.10 lire per hectolitre, or 3s. 2½d. per bushel, giving a total value of 3,520*l.*, a diminution of 63,000 bushels and 13,000*l.* value as compared with 1892.

Fruit.

Oranges and lemons gave a similar production to that of 1892, viz., about 3,000,000 of fruit, valued at 1,500*l.*

Figs totalled up in 13,000 tons, which were exported dried, 6,700 tons to Austria, 2,200 tons to Venice, 2,100 tons to other Italian ports, leaving with the remainder from 1892 about 5,000 tons for local consumption and export during the early months of 1894.

Figs in 1893 produced 2,000 tons less in quantity, and 20,000*l.* less in value compared with 1892, viz., 13,000 tons, which, at 6*l.* per ton, gives a total of 80,000*l.*

Most fortunately for the province of Lecce the harvest of cereals and fruit collectively gave an increased production to the value of 170,000*l.*, mitigating to a certain extent the enormous diminution in the value of the vintage.

Wine, the staple production of this province, and in fact of Wine. the whole of the Puglie, has failed during 1893, and but for the improvement in the cereals and in the oil crop such failure must have led to universal disaster. The consequences are, however, serious in the extreme to the whole population, almost every inhabitant being either owner or interested in the ownership of land.

The peronospera took a firm hold on the province in the spring of the year, and the proprietors, already in straitened financial circumstances, and not fully persuaded as to the efficacy of sulphate of copper dressings as a preventative or curative (they not having had occasion to use it before), fearing to further cripple their very limited resources by expending relatively large sums on irrigation of the growing vines by sulphate of copper washes, did little or nothing, hoping for the best. But, unfortunately, the worst came, and more than half of what would otherwise have been a fine vintage was lost.

The costly experience of 1893 has served as a lesson, and during the present year of 1894 the vines have been liberally treated with sulphate of copper washes, in solutions of from 1 per cent. to 3 per cent., the leaves and fruit being sulphured with a mixture of 96 per cent. of sulphur, 1 per cent. of lime, and 3 per cent. of sulphate of copper applied dry by bellows.

A gelatinous preparation of hydro-carbonate of copper is also being used in some parts of the province, it is called the "Bordeaux dressing," and though more costly than the double operation above referred to, is said to withstand rain, the gelatinous form of the dressing adhering to the plant through rain, which simply washes off the other applications and, leaving the plant damp, necessitates the immediate repetition of the treatment: damp being the inevitable cause of mildew and with it peronospera.

So far, this year 1894, the province has been fairly free of peronospera, and should it escape such a visitation as last year's, or be successful in repelling such an invasion, a crop of 250,000 tons of wine may be anticipated in 1894, which would mean in round figures from 2,000,000*l.* to 3,000,000*l.*

Phylloxera has not made its appearance in the province this year, but it is known to exist in at least 2,500 districts of Northern and Central Italy. On this circumstance is based the

expectation that there will be no difficulty in finding a market for the crop of the province of Lecce should it prove favourable.

In such case the pecuniary result which must accrue will go to alleviate the scarcity of ready money and the scanty credit now gravely affecting all commercial operations in this province, as in all parts of Italy.

As compared with the 4 years immediately preceding, the following was the 1893 crop:—

Year.						Quantity.
						Tons.*
1889..	..	..	..	..	..	95,083
1890..	..	..	..	..	..	165,000
1891..	..	..	..	..	..	140,000
1892..	..	..	..	..	..	200,000
1893..	..	..	..	..	..	100,000

* Estimated

The selling price during 1893 varied much, owing to the poor quality of such wine as had been produced in vineyards more or less ravaged by the *peronospera*; but 10*l.* a ton is a fair medium of the prices obtained during the year.

In my report for 1892 I stated that it was estimated that a residue of 25,000 tons of wine remained from that year's vintage for consumption during 1893, this with the crop of 1892, taken as 100,000 tons, gives a total of 125,000 tons which was disposed of as follows:—

WINE.

Description.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Shipped from Brindisi	8,126	26,289
„ Gallipoli	13,612	17,042
„ Taranto	1,605	780
Total seaborne export	23,343	44,091
By railway from stations of the Meridionale Line—		
Wine 17,329		
Grapes.. .. . 7,594	24,923	51,947
By railway from stations of the Mediterraneo Line—		
Wine 401		
Grapes.. .. . 1,056	1,457	150
Total export by sea and rail	49,723	96,188
Used by distilleries	22,668	34,200
Total sent to market	72,391	130,388
Local consumption in 1893 diminished to 50 litres per head of population of 600,000, as against 70 litres in 1892	30,000	42,000
Total consumption.. .. .	102,391	175,527
Estimated remainder for the following year ..	22,709	25,000
Total	125,100	200,527

I have been able to trace the destinations of a considerable portion of the 23,343 tons exported by sea, and the 26,380 tons forwarded by rail, in all 49,723 tons, which were forwarded as follows :—

Destination.	Quantity.
	Tons.
To Austria	6,882
Egypt	1,455
France	518
Switzerland	878
Germany	203
South America	748
Great Britain	100
Venice and district	16,364
Genoa and district	3,928
Rome	3,269
Sicily	1,562
Various part of Italy, &c.	13,826

Distilleries.

Distilleries have been condemned to enforced idleness during 1893 to a great extent, in consequence of the scarcity and high price of the wine necessary for purposes of distillation.

Of the 54 existing stills, 40 were at work during the first and a part of the second quarter, when the number fell to 13, to increase during the last quarter to 23, or a medium of 29 during the year.

226,682 hectolitres, equal to about 5,000,000 gallons of wine and vinaccia, were used for purposes of distillation.

2,347,600 litres of spirit of 52 degrees, equal to 1,213,600 litres of pure spirit, or 267,158 gallons being produced.

The revenue duty encashed on this spirit amounted to the sum of about 50,000*l*.

The consumption of wine and vinaccia consumed was about 12,000 tons less than during 1892; had this raw material been forthcoming, the demand for spirit was well maintained.

Olive oil.

The oil crop of 1893 is calculated to have yielded quite 24,000 tons of oil of fairly good quality; this, at an average value of 31*l*. per ton, would give a total value of 744,000*l*., an increase of 19,000 tons in quantity, and 571,000*l*. in value, as compared with 1892; but the same quantity only of 26,000*l*. less value than the 1891 crop.

During 1893 the exportations were:—

To—	Quantity.
	Tons.
Great Britain	2,020
Russia	1,044
Austria	104
Egypt	84
Malta	50
India and Australia	20
South America	37
Other countries	95
Genoa and Venice (probably for shipment or to be forwarded by rail to other countries)	7,736
Italian destinations	2,140
Total	13,330

Necessarily the exportation from the 1893 crop will continue during 1894: the crop of which year will in all probability be much less than that of 1893. The olive producing abundantly alternate years.

Tobacco.

I much regret that it has been quite impossible for me to obtain any reliable information on the subject of the tobacco production of this province.

In my report for the year 1891 I stated that the cultivation of tobacco, so long a most important branch of agriculture in the province of Lecce, the snuff produced from which was most highly esteemed, was at a standstill.

In the Chamber of Deputies much has been said on the subject of encouraging this interest, at present crippled by the

rigorous application of regulations which render it all but unremunerative to the grower.

From private sources I gather that the production of tobacco in this province is annually diminishing, a fact much to be regretted, as there can be no reason why this branch of husbandry should not flourish without any loss to the revenue accruing in consequence.

Credit and Savings Banks.

The total amount of bills of exchange discounted in this province by the Banca d' Italia and the Banco di Napoli together amounted to 1,041,050*l.*; the bills not paid at maturity at the end of the four quarters of the year were:—March 31, 739*l.*; June 30, 342*l.*; September 30, 1,492*l.*; and December 31, 116,449*l.* Discounts.

The total amount discounted was 18 per cent. less than in 1892 and 64 per cent. less than in 1887, when the amount was 2,868,000*l.*

In my previous reports I have drawn attention to the grave difficulties to commerce and industry, deriving from the persistent and increasing limitation of credit; and expressed a hope that the banks would be enabled to facilitate business in this direction; unfortunately this has not happened, and the augmented restriction of discounts coming with the failure of the 1893 vintage, has had the most serious consequences to this province.

From the figures above given of unpaid due bills of exchange, it will be seen that 46 per cent. of the bills discounted during the third quarter of the year were not paid at maturity, owing to the unfortunate result of the vintage, which actually yielded two-fifths only of the crop which was confidently anticipated until the ravages of the peronospera became known and the consequences assessed; and affecting directly or indirectly the whole population, rendered it impossible for a large number of proprietors and others to meet their engagements.

The distress consequent on this state of things has been general, the lowest classes of the labouring population having in certain districts been severely pinched.

The scarcity of financial resources has caused proprietors during the whole of 1893 to give their land a minimum of labour, and that at the lowest possible cost, with the result that work was scarce during the whole year, and in certain districts there was scarcely work at all, causing masses of labourers to migrate to other parts of the province temporarily, in search of work.

Wages fell as a natural consequence, and from published statistics I find that in 27 agricultural centres wages varied from 40 c. and a plate of beans or something similar, to 2 lire 50 c. per diem.

The Brindisi district did not suffer in consequence of the work afforded by the port, where coal portorage, &c., employs large numbers of men at rates of wages varying between 3 lire per diem for ordinary cargo work to 10 lire for exceptionally hard work with

coal and pitch. Labour in vineyard varying from 1 lira 50 c. to 2 lire 50 c. per diem.

In the Taranto district, labour being fairly remunerated in connection with the arsenal works the low rate paid for agricultural work was not so severely felt, but in the southern parts of the province, where there were no such works to fall back on, the poor have been very badly off, their daily wage rarely rising beyond a medium of from 70 c. to 90 c. per diem, the commonest articles of food being dearer than usual.

Popular
banks.

The amount of bills of exchange discounted and held by the 13 banks called "Banche del Popolo" existing in this province on December 31, 1892, was 76,700*l*.

During the year 1893, at the four quarters, the amount of unpaid bills were:—5,724*l*., 6,358*l*., 5,641*l*., and 5,157*l*.; the total amount of paper held by them collectively at December 31, 1893, was 94,101*l*.

Of unpaid bills at December 31, 43 per cent. of the total amount was in the hands of the Gallipoli Bank and 35 per cent. in that of Brindisi: this, as against 20 per cent. and 30 per cent. respectively on December 31, 1892.

Savings
banks.

The balance of deposits in the "Cassa di Risparmio" on December 31, 1892, was 65,500*l*.; on December 31, 1893, it was 55,244*l*.

Post-office
savings
banks.
Protests.

During the same period, the balances in the hands of the Post Office savings banks increased by 13,197*l*.

2,198 bills of exchange were formally protested by the different banks for non-payment, a very important increase in number as compared with 1892.

Deposits.

The deposit accounts with the two Government banks, viz., the Banca d' Italia and the Banco di Napoli, which on December 31, 1892, amounted to 254,000*l*.; gradually diminished through the year to a balance between the two banks of 143,928*l*. at December 31, 1893.

The balances of current accounts similarly fell from 183,486*l*. to 93,224*l*.

Cash transfers.

Remittances are almost exclusively transmitted by "Vaglie Cambiarie" or bank sight order drafts, which are issued and paid by all agencies of the Government banks abovenamed. The following were paid and issued by the Banca d' Italia and the Banco di Napoli in this province:—

Year.	Paid.		Issued.	
	Number.	Amount.	Number.	Amount.
1893	26,803	£ 1,676,730	28,572	£ 1,254,112
1892	24,950	1,543,000	29,181	1,459,000
Variation	+ 1,853	+ 133,730	- 912	- 195,890

During 1893, 422,618*l.* was paid by the banks more than was encashed, similarly in 1892, 93,000*l.* was paid more than was encashed.

The total number and amount of such drafts paid and issued during 1893-92 were :—

Year.					Number.	Amount.
						£
1893..	..	..	..	..	55,375	2,930,842
1892..	..	..	..	..	54,434	2,993,000

Forty firms became bankrupt during the year 1893, but it was impossible to learn how many firms obtained the “Moratoria,” which has the effect of giving the debtor 6 months' time to pay his debts or come to an arrangement with his creditors; besides which, many other firms arranged amicably with creditors without judicial intervention of any kind. Failures.

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